

ALASKA VISITOR STATISTICS PROGRAM



ALASKA VISITOR ARRIVALS SUMMER 1993

Department of Commerce & Economic Development
Alaska Division of Tourism
State of Alaska



JUNEAU • KETCHIKAN

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Introduction

Summary of Major Findings

Executive Summary

***Marketing Trends and
Implications***

Introduction

The *Alaska Visitor Statistics Program* (AVSP) was launched by the State of Alaska Division of Tourism in 1985. This ground-breaking visitor industry research program has been recognized as one of the most sophisticated among the 50 states. The McDowell Group of Juneau and Ketchikan, Alaska was selected by the Division of Tourism to conduct the 1993-94 study. This firm was also the program contractor in 1989-90 and in 1985-86.

Tourism continues to be an industry of growing importance to the state. Once regarded as a stepchild of the major traditional resource industries, tourism's tremendous growth in the past 10 years has given it legitimacy as a major industry. The AVSP, now in its third incarnation, is a critical link in understanding the Alaska tourism market. This program provides detailed information about visitors to the state so that government and industry can channel their marketing and development efforts in the most productive fashion.

The AVSP program consists of sampling arriving visitors for the period of one year by personal intercept interview, an expenditure diary survey, and a follow-up mail survey. The methodology developed by the McDowell Group has consistently yielded national records in response rates for visitor survey research; 97% for the personal intercept survey, 63% for the diary and 64% for the comprehensive mail survey for Summer 1993. These response levels are similar to previous years.

A series of six comprehensive reports result from these surveys. This report, *Alaska Visitor Arrivals, Summer 1993*, is the first in the AVSP III series.

The program has four distinct but interdependent phases. These are the *Arrival Count*, *Random Arrival Survey*, *Visitor Expenditure Survey*, and *Visitor Opinion Survey*. The exhibit and map on the following pages show the survey locations and program phases.

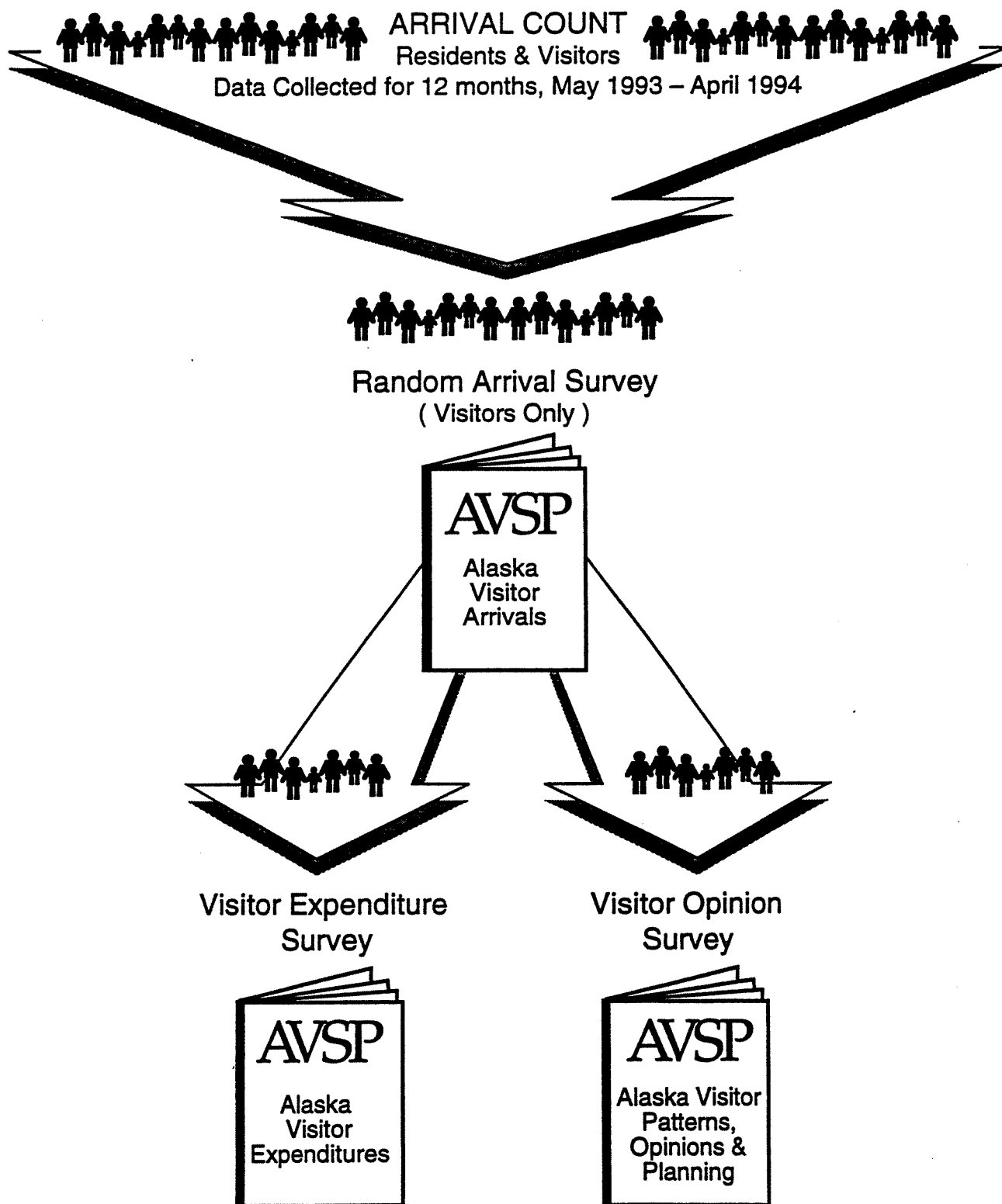
Alaska Visitor Statistics Program III Phases

<i>Phase</i>	<i>Description</i>	<i>Purpose</i>
1. Arrival Count (AC)	Secondary research collection of data on all passengers arriving in Alaska at their first points of entry.	To quantify the number of visitors and residents entering the state by each mode, using ratios found in the RAS phase, below.
2. Random Arrival Survey (RAS)	Personal intercept interviews with a scientific sample of visitors at their first point of entry.	To determine composition of visitors including their trip purpose, modes of entry/exit, origin, age, party size, gender, and travel type. To measure resident/visitor ratios for each entry mode for expansion to Arrival Count data. To collect names and addresses for VOS mail out survey. To administer VES diary to arriving visitors.
3. Visitor Expenditure Survey (VES)	29- day expenditure diary booklet distributed on arrival to every other RAS respondent.	To provide visitor expenditure data by detailed category and by region and community.
4. Visitor Opinion Survey (VOS)	20-page survey booklet with personalized cover letter from DOT Director mailed to every other RAS respondent (the other half not receiving a diary) after their return home.	To assess visitor use of and satisfaction with statewide and regional facilities, accommodations, attractions, transport modes and activities. To determine visitor volume by community, region and attraction. To collect trip characteristics data. To collect data on the Alaska trip planning process, travel habits and demographics.

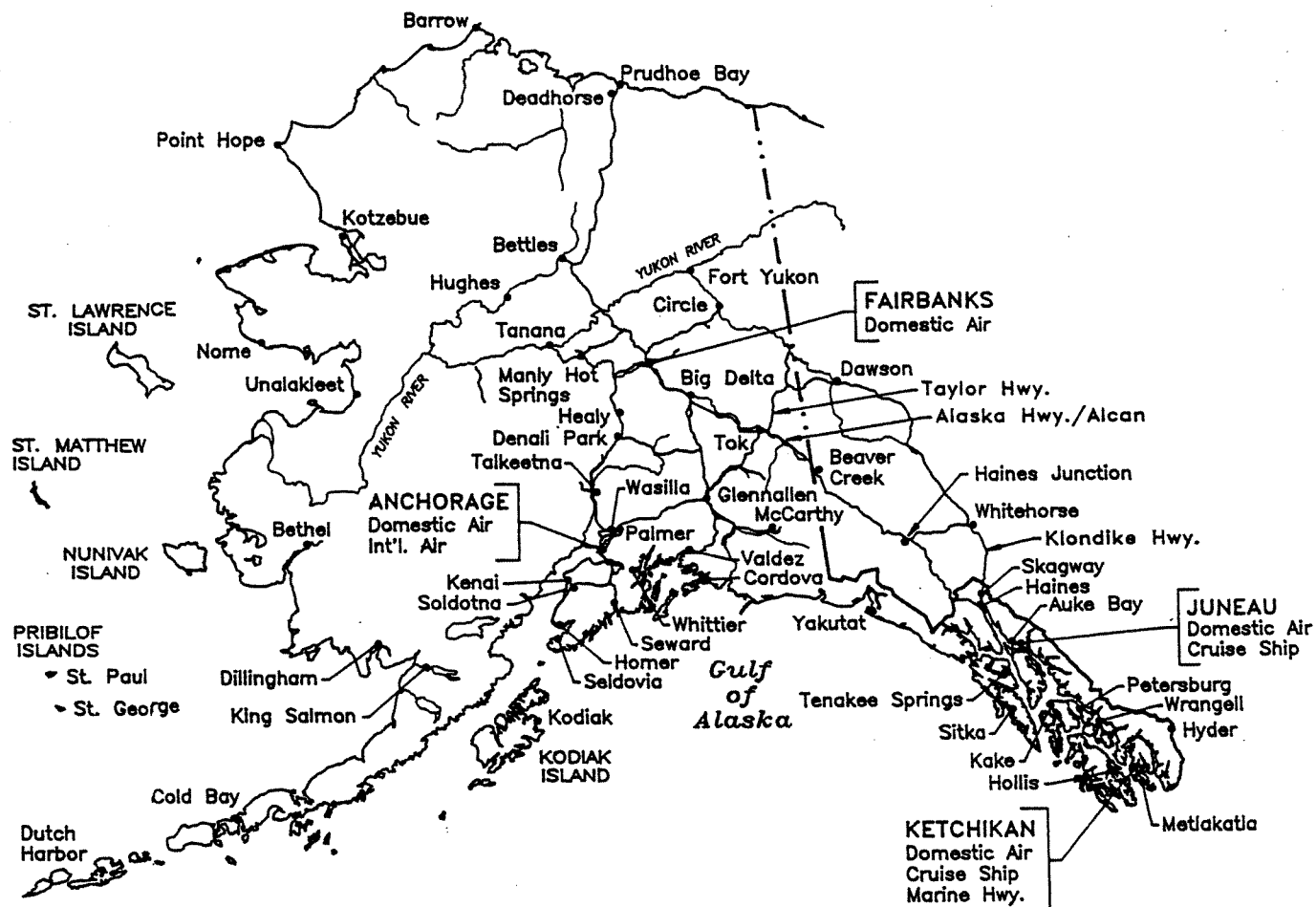
The six major reports generated as part of the program are:

<i>Report</i>	<i>Date</i>
1. Alaska Visitor Arrivals, Summer 1993	January 1994
2. Alaska Visitor Expenditures, Summer 1993	March 1994
3. Alaska Visitor Patterns, Opinions and Planning, Summer 1993	May 1994
4. Alaska Visitor Arrivals, Fall/Winter/Spring, 93-94	October 1994
5. Alaska Visitor Expenditures, F/W/S 93-94	November 1994
6. Alaska Visitor Patterns, Opinions and Planning, F/W/S 93-94	December 1994

Alaska Visitor Statistics Program III Phases



Random Arrival Survey Locations



ENTRY TRANSPORTATION MODE

SURVEY LOCATION	Domestic Air	Cruise Ship	Highway	Marine Highway	International Air
ANCHORAGE	X				X
FAIRBANKS	X				
JUNEAU	X	X			
KETCHIKAN	X	X		X	
Alaska Hwy.			Auto		
Klondike Hwy.			Auto		
Taylor Hwy.			Auto		

NOTE:

Marine Highway is sampled onboard vessels from Prince Rupert and Bellingham underway to Ketchikan. Alaska Highway is sampled at intersection of Taylor Highway and Alaska Highway near Tok. Klondike Highway is sampled at the U.S. Customs Service station at Skagway.

Reader Notes

Reader Notes are provided to help the reader better understand the unique features of the *Alaska Visitor Statistics Program* reports. Included are explanations of terminology and important background information on sampling techniques.

Terminology

RAS: (*Random Arrival Survey*) This was the actual visitor research survey used to generate the information in this *Alaska Visitor Arrivals* report.

Summer Season: The Summer Season for 1985 through 1992 was defined as June, July, August and September. For the 1993-94 AVSP, May was added to the definition of the Summer Season. In order to compare 1993 results with previous years, Summer 1993 visitor overview data has been prepared both with and without May.

Skagway Arrivals: Skagway arrivals were sampled for the first time during Summer 1989. In order to compare previous AVSP results from 1985-86, Summer 1989 and 1993 data has been prepared without Skagway arrivals.

Trend Tables: Chapters I and II include a number of tables comparing Summer 1993 results with the results from previous years (1985, 1986, 1989). Summers 1989 and 1993 included sampling in Skagway, while Summers 1985 and 1986 did not. Summer 1993 also included sampling during May, while the previously sampled summers did not. Data is presented in these tables for all four summer sampling periods which do not include May and Skagway arrivals to allow for more accurate comparison between years. In addition, one column includes 1993 data in total, that is, with May and Skagway arrivals. See sample below:

Visitors by Main Trip Purpose
Summers 1985, 1986, 1989, and 1993

Trip Purpose	Visitors By Trip Purpose Summers 1985, 1986, 1989, 1993				With May With Skagway 1993
	1985	1986	1989	1993	
Vacation/Pleasure	272,600	356,200	331,200	510,300	594,200
Visiting Friends & Relatives	77,200	65,400	82,500	78,000	88,800
Business & Pleasure	36,800	31,600	46,000	44,700	55,800
Business Only	44,600	52,000	37,300	70,000	84,900
Seasonal Worker	17,600	8,600	15,200	10,100	13,200
Total Visitors	448,800	513,500	513,200	713,200	836,900

Total Arrivals: This is the number of all arriving passengers, both residents and visitors, entering Alaska during the summer season. Arrivals were counted at their first point of entry. For Summer 1993, total arriving passengers tallied 1,207,528.

Total Visitor Arrivals: This is the total number of visitors entering Alaska. Visitors were counted at the first point they entered the state, not as the number of users of each transportation mode. For instance, 246,967 visitors entered Alaska by Cruise Ship, though many more, usually entering by Domestic Air, used Cruise Ships as a transportation mode during their Alaska trip. In Summer 1993, 861,117 visitors entered Alaska.

Entry/Intended Exit Modes and Mode Use Categories: Entry mode refers to the transportation mode used by visitors to enter Alaska. Sometimes visitors will enter by one transportation mode and exit by another. Therefore, entry mode figures alone do not show total number of visitors using a particular mode. For example, Cruise Ship visitor arrivals for Summer 1993 totaled 247,000. These were visitors who arrived in the state by Cruise Ship. However, we know that the Cruise Ship market was actually much bigger, since many Cruise Ship users arrived by Domestic Air and cruised one-way from Seward/Whittier to Vancouver B.C. Total Cruise Ship use was over 300,000. Figures for total mode use are reflected in the Mode Use sections of this document.

Sampled and Unsampled Visitors: Nearly all visitors (97% or 836,920) were represented by the sample for Summer 1993. Only a small percentage of entry locations were unsampled, due to their small number of arriving passengers and budget limitations. These included motorcoach arrivals at the Alaska, Taylor and Klondike Highways (0.5% of total visitors), a small volume of Domestic Air first arrivals at locations other than the four sample points, and private vessel and aircraft arrivals at select locations (2.3%). While motorcoach arrivals were not sampled, each motorcoach was stopped at the Highway sample locations during each sample period. Drivers were asked the origin of the motorcoach, the number of passengers and whether the motorcoach was entering Alaska for the first time on this trip. This information was used to determine the size of the first arrival motorcoach market. Using past survey results and secondary research, visitor arrivals were estimated for other first arrivals (e.g. Domestic Air, private vessel and aircraft) at the unsampled locations.

Chapter I outlines all arrivals and visitor arrivals using both sampled and unsampled data. In the remainder of the report, detailed findings are presented for **sampled visitor arrivals** only.

Employment Categories: Three employment categories were available for visitors: employed, retired and other. The "other" category refers to people who are not participating in the labor force who are not retired, such as students, children and other individuals who are not employed.

Sampling Information

The sample days for each entry mode were selected using a random method based on passenger load information. Sample periods within each sample day were also selected using passenger load information. For instance, on each of the sample days selected for Domestic Airline sampling, six flights were selected to be sampled. Passenger load information was collected through a confidential reporting system two days prior to the sample day and flights were selected using a random process based on those passenger loads. In reviewing the data, the reader should be aware of the following special circumstances.

The AVSP sample was designed by entry mode ensuring accurate entry mode data. Exit data, requested of each of the visitors interviewed prior to taking their trip through Alaska, reflects intention not actual behavior. Many visitors stayed for long periods of time and did not have set itineraries. Visitors most likely to not know their actual exit transportation mode were Independent visitors using the Highway or state Ferry system. Also, many visitors were not entirely familiar with Alaska geography believing that they were leaving Alaska when they took a southbound ferry out of Haines, or believing they were flying out of Alaska when boarding a plane in Vancouver B.C. While interview techniques minimized these faulty responses, minor differences between intended exit mode and actual exit information are expected. Actual exit selection will be available in the *Patterns, Opinion, and Planning*, document, the third of the Summer 1993 reports.

Sample Design Limitations: Readers should understand the limitations of a sample, rather than a count, or inventory, of visitors. While all visitors were "counted" by collecting secondary data by entry mode and carrier, their characteristics (such as origin, age, trip purpose, etc.) were measured only by the survey. From a sample of less than 1% of all visitors, the elaborate AVSP multi-stage cluster sample design was able to measure the characteristics of most groups of visitors with a high degree of accuracy ($\pm 2\%$). The AVSP sample is one of the largest and most sophisticated samples done in the U.S. visitor industry, but even it cannot do everything. When a specific group is so small that it is nearly undetectable in the sample this accuracy declines.

The multi-stage cluster sample design for AVSP ensures extremely accurate data for most visitor groups, including those of small to moderate significance (at least 4,000 out of 836,920 visitors). When readers look for visitor groups that are less than 0.5% of the total, existing survey methodology was not intended to record them accurately. For example, the total number of Overseas visitors (53,500) is considered accurate. However, the number of visitors from small volume countries, such as Belgium or Norway, were simply not measured as accurately as the numbers from major producing countries such as Germany and Japan.

Korea and Taiwan are another example of this situation. The survey shows 700 Koreans and 600 Taiwanese represented by the sample. Yet, based on interviews with industry executives, we suspect these figures are somewhat higher. Likewise, the survey may overstate the number of visitors from other low volume countries such as Tahiti (400). By the same token, the number of visitors from all large volume states and most other states is accurately recorded by the survey. But the nearly insignificant numbers produced by some states (e.g. North Dakota), will not be recorded precisely by a methodology targeted at and budgeted for Alaska's major visitor groups. Only true random sampling, a financially unfeasible method, would accurately pinpoint the number of visitors from very small volume countries and states. Another more reasonable alternative to capture accurate visitor data from low volume countries would be to have a separate research effort concentrating only on Overseas visitors.

Charter Flights: Charter flights, from both domestic and international origin points are reflected in the data. Domestic charter flights were a daily occurrence in Anchorage during the summer months. These flights appeared during the days selected to be sampled and visitors were sampled from these flights. International charters, on the other hand, consisted of two carriers scheduling weekly flights from Europe, and nine charters from Japan. The weekly charters appeared regularly in the sample plan. However, a special sample of the nine charters from Japan was conducted to capture a more accurate sample of Japanese visitors.

Cruise Arrivals of Overseas Origin: Although the interviewers were professionally trained in both interviewing techniques and cultural considerations when approaching Asian visitors and had foreign language translations of surveys available, occasionally Asian visitors arriving by cruise ship refused to take part in the study. Where possible, attempts were made to replace these refused interviews with other cruise visitors of Asian origin. Of the 739 cruise interviews completed, six refusals were recorded from visitors of Asian or other origin, totaling about 2,000 visitors (out of 836,900).

Potential Undercount of Overseas Visitors: When totaled, these refusals may have resulted in a small undercount of overseas visitors by approximately 2,000 to 3,000.

In summary, the number of Overseas visitors (sampled and unsampled) may total as high as 55,500, compared to the actual survey results of 53,500 (of 836,900 sampled visitors). This is well within the statistical parameters built into the survey design. This report provides details on the 53,500 Overseas visitors represented by the sampling process.

For a more detailed explanation of methodology, see the Appendix.

Summary of Major Findings

All Visitors

- The total of all **arrivals** (both residents and visitors) in Summer 1993 (May through September) was 1,207,528, an increase of nearly 4% over Summer 1992.
- The total of all **visitor arrivals** in Summer 1993 was 861,116, an increase of nearly 10% over Summer 1992.
- The two largest entry modes for Summer 1993 visitors were Domestic Air and Cruise Ship, followed by Highway, Ferry and International Air.
- Nearly three-quarters (71%) of the visitors to Alaska during Summer 1993 traveled to Alaska for Vacation/Pleasure. Eleven percent traveled mainly to Visit Friends and Relatives and slightly less than 20% traveled for business.
- The United States produces the largest number of visitors (83%), followed by Canada (10%) and Overseas (6%). A small portion of the sample did not provide origin information.
- The average visitor during Summer 1993 stayed an average of 10.2 nights in the state and traveled in an average party size of 2.1 people.
- Overall, two in ten visitors during Summer 1993 had traveled to Alaska at least once in the past five years for pleasure, while approximately one in ten had traveled to Alaska for business.
- Over half (57%) of Summer 1993 visitors traveled independently, with 13% planning to purchase sightseeing while in Alaska on their trip. Four in ten visitors were on a package trip.
- The average Alaska visitor during Summer 1993 was 48 years old, and slightly more likely to be male (53%) than female (47%).

Vacation/Pleasure Visitors (VPs)

- Vacation/Pleasure visitors comprised the largest trip purpose group, accounting for nearly three-quarters (71%) of the total visitor market during Summer 1993.
- Domestic Air and Cruise Ship were the primary transportation modes to and from the state for Vacation/Pleasure visitors. Highway was the third most important entry and exit mode, followed by Ferry and International Air.
- Six in ten (58%) of all Vacation/Pleasure visitors traveled on a Package trip, while 42% traveled as Independents, with 14% planning to purchase sightseeing while in Alaska.
- Vacation/Pleasure visitors stayed an average of 9.4 nights in the state, slightly less than the average visitor and fewer nights than any other trip purpose group with the exception of Business Only visitors.
- The average party size for Vacation/Pleasure visitors is 2.2, down slightly from 2.4 during Summer 1989.
- Overall, two in ten Vacation/Pleasure visitors have taken repeat trips for either pleasure or business in the last five years. Two in ten VPs have taken a pleasure trip, while less than one in ten have taken a business trip in the last five years.
- Nine in ten Vacation/Pleasure visitors originated from the U.S and Canada. VPs from overseas have doubled in the past four years and comprised nearly one in ten VP visitors.
- The average age of Vacation/Pleasure visitors, which steadily declined until 1989, appears to have stabilized at 50 during 1993. Over half of VPs were retired and one-third were employed during Summer 1993.

Executive Summary

Resident and Visitor Arrivals

Total Arrivals

All passengers (residents and visitors) arriving in Alaska during the Summer (May through September) 1993 totaled 1,207,528. Visitor arrivals accounted for 71% of all arrivals, or 861,117 people.

Summary Table I

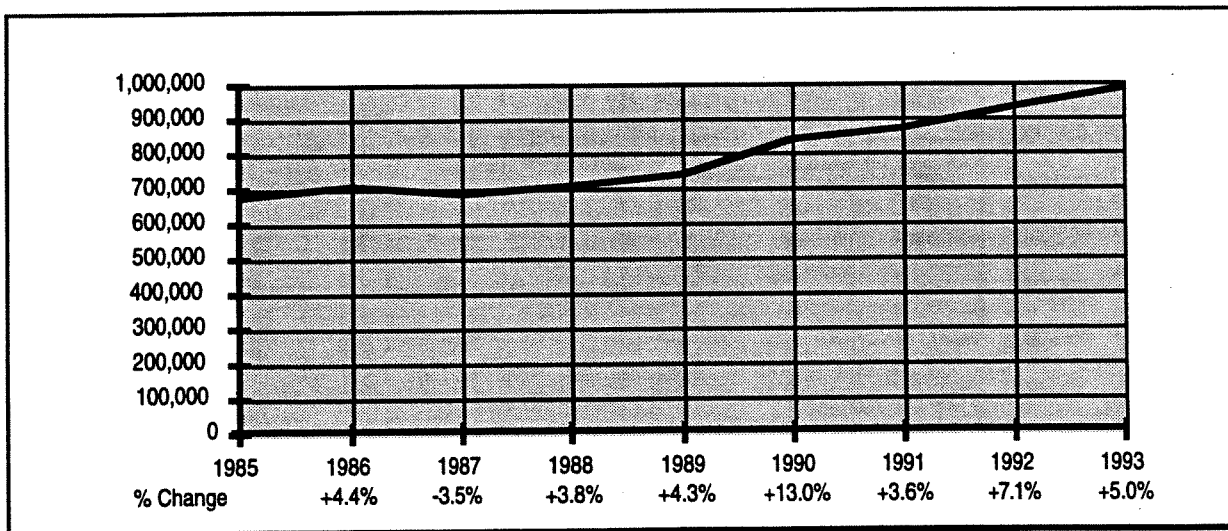
**Total Arrivals to Alaska
Summer 1993**

Totals Arrivals	% Visitors	Total Visitors
1,207,528	71.3%	861,117

Overall, total arrivals (residents and visitors) have increased significantly between Summer 1985 and Summer 1989. A notable increase in Summer 1986 arrivals was followed by a decline in Summer 1987. However, resident and visitor growth has remained steady since Summer 1989, with total arrivals surpassing the one million mark (1,207,528) in Summer 1993.

Summary Graph I

**Total Arrivals
Passengers (Residents and Visitors Combined) Entering Alaska
Summer 1985 - Summer 1993**



Note: Includes June through September arrivals, excluding Skagway arrivals for purposes of year-to-year comparisons. June through September arrivals excluding Skagway for Summer 1993 totaled close to one million.

Visitor Arrivals

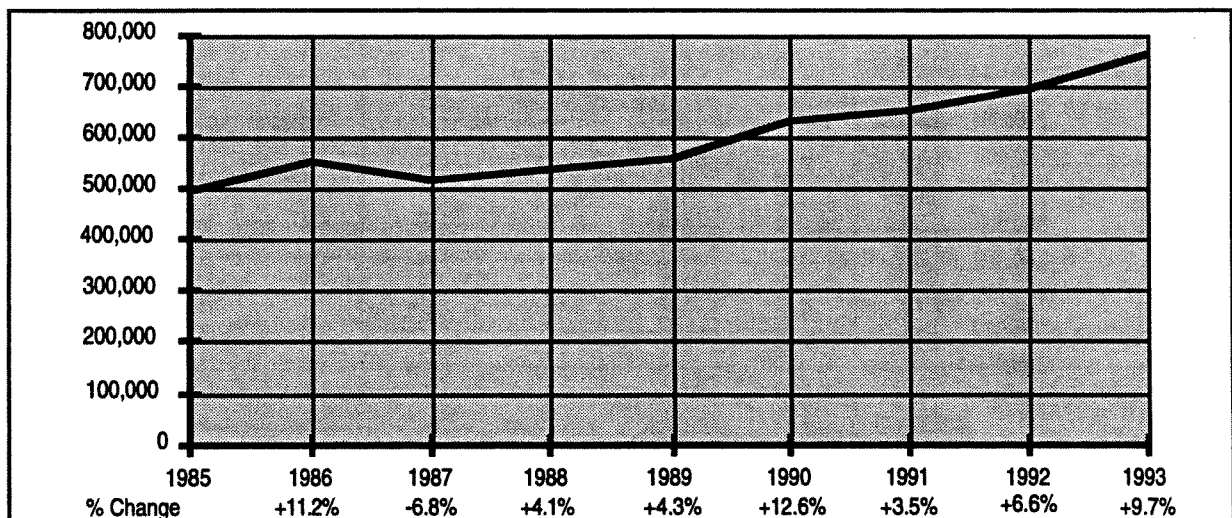
Visitor arrivals have grown significantly since Summer 1985, the first season of AVSP data. With the exception of Summer 1987, visitor arrivals have steadily increased. The total visitor market has grown 55% since Summer 1985.

The graph below shows this growth trend since the first year of data collection. It is important to note that the graph reflects visitor arrivals for June through September excluding Skagway arrivals for comparison purposes.

(Note: Summer 1993 also included sampling during May, while the previously sampled summers did not. Data presented in the table below do not include May arrivals to allow for more accurate comparison between years).

Summary Graph II

Total Visitor Arrivals Including Skagway Passengers Entering Alaska Summer 1985 - Summer 1993



Note: Includes June through September visitor arrivals, including Skagway arrivals for purposes of year-to-year comparisons. Visitor arrivals for June through September, including Skagway totaled 760,200.

Resident/Visitor Arrival Composition

Overall, all arrival modes carried more visitors than residents during the summer months.

Domestic Air arrivals were nearly two-thirds visitors. In the past AVSP, (Summer 1989), the visitor composition was nearly identical.

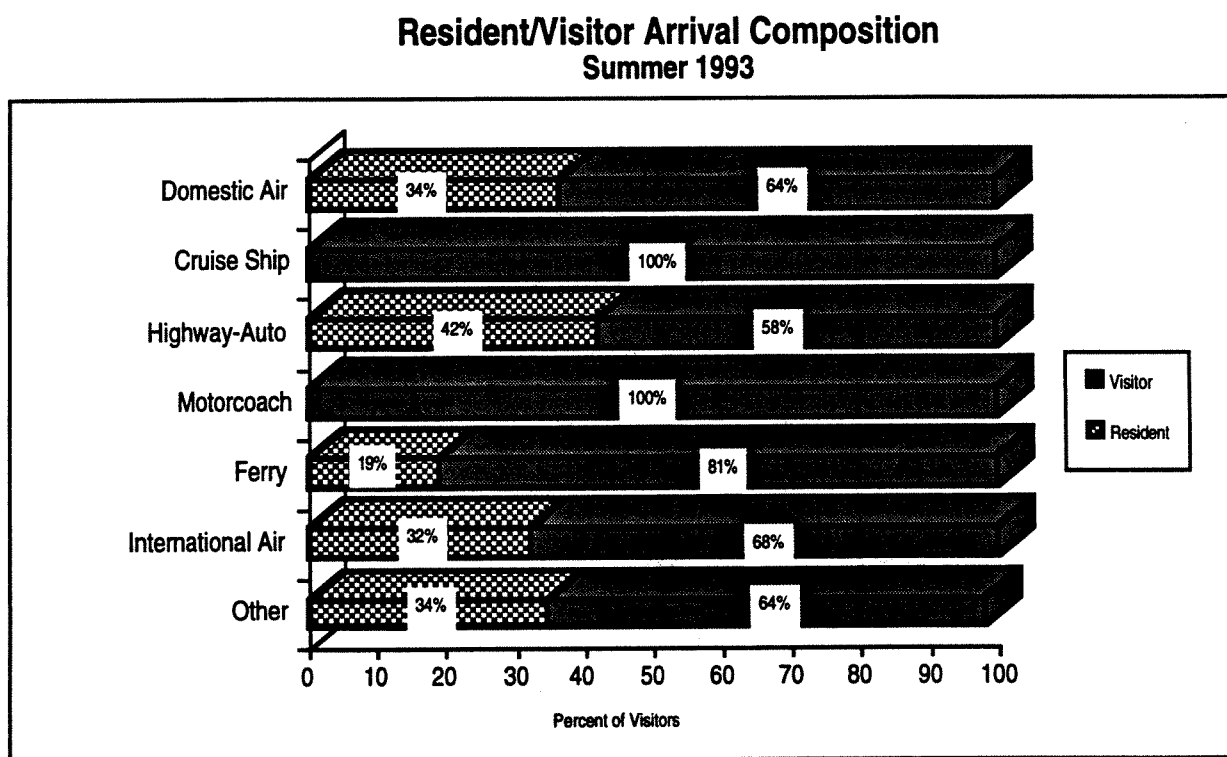
As in the past, virtually all Cruise Ship arrivals were visitors.

Six in ten highway arrivals were visitors. Compared with the previous year, this resident/visitor arrival composition has varied only a few percentage points.

Eight in ten Marine Highway arrivals were visitors. Again, as with Domestic Air, Cruise Ship and Highway arrivals, this resident/visitor composition was the same as in past years.

Two-thirds (68%) of International Air arrivals were visitors. Resident/visitor arrival composition of this mode has changed significantly from previous years. In the past, as many as 82% of International Air arrivals were visitors.

Summary Graph III



Visitor Arrivals by Entry Mode

Domestic Air was the dominant arrival mode during Summer 1993, carrying nearly 52% of all visitors arriving in the state. Domestic Air visitor arrivals have increased nearly 40% since Summer 1989.

Cruise Ships brought nearly 30% of all visitor arrivals into Alaska. A total of 247,000 visitors arrived by Cruise Ship in Summer 1993. (It is very important to recognize that this is not the total number of visitors traveling on a Cruise Ship in Alaska. It is only the total number that entered the state on a Cruise Ship. In 1993 around 300,000 visitors traveled by Cruise Ship while 247,000 entered Alaska by cruise ship.) Since 1989, Cruise Ship arrivals have increased a total of 53%.

Highway mode represented 12% of all visitor arrivals to Alaska during the summer months for a total of nearly 104,000, an increase over previous years estimates. (These numbers are arrival numbers representing those visitors who entered by Highway only, not all the visitors who traveled on Alaska highways).

The Alaska Marine Highway System (Ferry) represented a small portion of visitor arrivals, just 3.4% or 29,100. Figures for Summer 1993 are slightly higher than Summer 1989.

International Air was the arrival mode with the smallest number of visitors entering the state, just 1.5% of the total or 13,300. This represents a decrease (17%) from Summer 1989.

Summary Table II

Visitor Arrivals by Entry Mode Total Visitors Sampled and Unsampled by AVSP Survey Summer 1993

Sampled Arrivals	Total Arrivals	% Visitors	# of Visitors	% of Total Visitors
Domestic Air	697,451	63.6 %	443,642	51.5 %
Cruise Ship	246,967	100.0	246,967	28.7
Highway-Personal Vehicle	172,072	60.4	103,972	12.1
Ferry	35,905	81.0	29,075	3.4
International Air	19,458	68.2	13,264	1.5
Total Sampled Arrivals	1,171,853	71.4 %	836,920	97.2 %
Unsampled Arrivals				
Highway-Motorcoach	4,143	100.0 %	4,143	0.5 %
Other	31,532	63.6	20,054	2.3
Total All Arrivals	1,207,528	71.3 %	861,117	100.0 %

Note: All study results following Table I-B are of **sampled visitors only**. By definition, the remainder of this report deals with the nearly 97% of all visitor flows sampled in the survey process.

Visitors by Main Trip Purpose

Overall, Vacation/Pleasure (VP) has been and continues to be the primary trip purpose for visitors to Alaska, with the number of VPs coming to Alaska growing 87% between Summer 1985 and Summer 1993. In Summer 1993, VPs constituted 71% of all visitors.

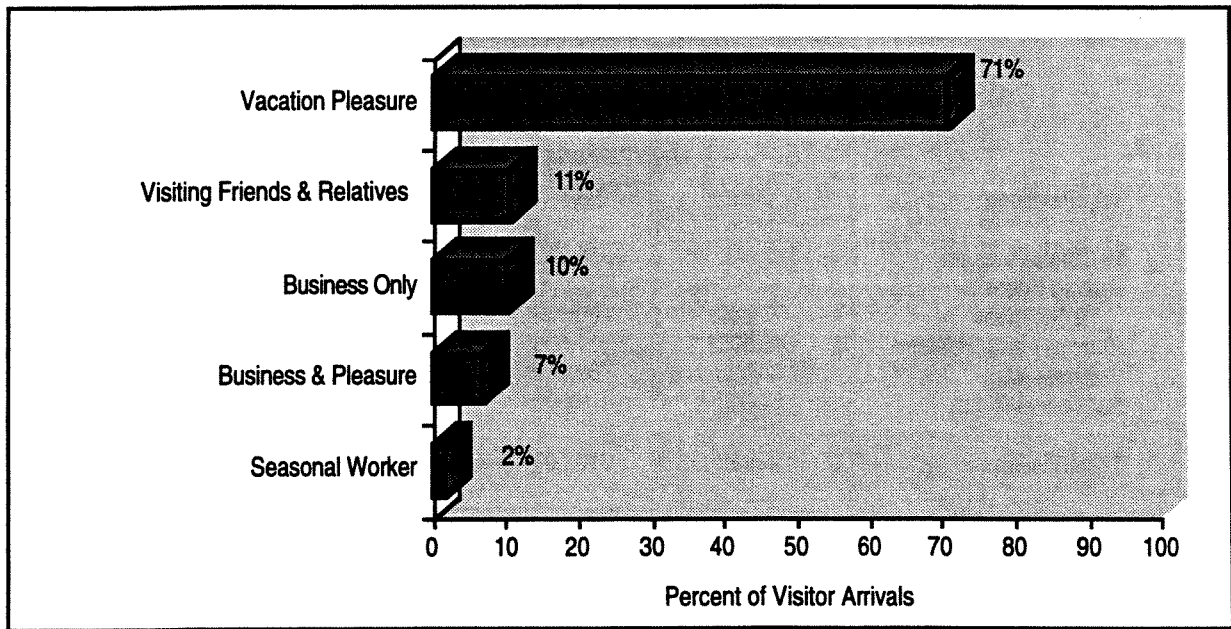
Visitors to Alaska visiting friends and relatives were 11% of all visitor arrivals or a total of 88,800 visitors. Compared with previous summer seasons, the size of the Visiting Friends and Relatives (VFR) market has grown little.

The number of visitors traveling to Alaska for Business Only (BO) purposes has also grown substantially over the years and represents 10% of all visitor arrivals. Business and Pleasure (BP) visitors, on the other hand, represent a smaller portion of overall visitor arrivals (7%) and have not grown as fast as the Business Only market in recent years.

Seasonal Workers (SW) represent the smallest trip purpose group at 2% of all visitors. Seasonal Worker volume has fluctuated over the years.

Summary Graph IV

**Visitor Arrivals by Main Trip Purpose
Percent of Sampled Visitors
Summer 1993**



Summary Table III

**Visitor Arrivals by Main Trip Purpose
Sampled Visitors
Summer 1993**

Trip Purpose	Number of Visitors	
Vacation/Pleasure	594,200	
Visiting Friends and Relatives	88,800	
Pleasure Related Total		683,000
Business and Pleasure	55,800	
Business Only	84,900	
Seasonal Workers	13,200	
Business Related Total		153,900
Total Visitors		836,900

Summary Table IV

**Visitors by Main Trip Purpose
Summers 1985, 1986, 1989, and 1993**

Trip Purpose	Visitors By Trip Purpose Summers 1985, 1986, 1989, 1993				
	← Without May Without Skagway →				With May With Skagway
	1985	1986	1989	1993	1993
Vacation/Pleasure	272,600	356,200	331,200	510,300	594,200
Visiting Friends & Relatives	77,200	65,400	82,500	78,000	88,800
Business and Pleasure	36,800	31,600	46,000	44,700	55,800
Business Only	44,600	52,000	37,300	70,000	84,900
Seasonal Worker	17,600	8,600	15,200	10,100	13,200
Total Visitors	448,800	513,500	513,200	713,200	836,900

Entry and Intended Exit Mode

All Visitors

Over half of all visitors traveled to and from Alaska by Domestic Air. Cruise Ship was the second most used entry and exit mode among all visitors followed by Highway and Ferry. A few visitors traveled by International Air, slightly more for exiting rather than entering the state.

Vacation/Pleasure Visitors (VPs)

Vacation/Pleasure visitors were just as likely to use Domestic Air as Cruise Ship for travel to and from Alaska. However, VPs were more likely to enter Alaska by Cruise Ship than any other transportation mode, and more likely to exit via Domestic Air. Highway is the third most used transportation mode among VPs, followed by Ferry and International Air. Like all visitors to Alaska, VPs were slightly more likely to use International Air for exiting rather than entering the state.

Summary Table V

Modes of Transportation All Visitors and Vacation/Pleasure Visitors Summer 1993

	All Visitors	Vacation/Pleasure Visitors
Entry Mode		
Domestic Air	53.0 %	38.3 %
Cruise Ship	29.5	40.9
Highway	12.4	15.4
Ferry	3.5	3.8
International Air	1.6	1.6
Exit Mode		
Domestic Air	54.6 %	40.9 %
Cruise Ship	27.0	37.5
Highway	12.8	15.9
Ferry	2.7	3.0
International Air	2.4	2.4

Market Size by Mode Use

A mode's market size combines round-trip visitors and visitors who used the mode for one leg of the journey. In Summer 1993, more visitors, including VPs, used a single transportation mode for round-trip travel than one-way travel to either enter or exit the state.

All Visitors

Domestic Air represented the largest mode market in Summer 1993, carrying nearly two-thirds or 532,000 of Alaska's visitors. Visitors utilizing Domestic Air were more likely to travel round-trip (368,100) than one-way (163,900) via domestic carriers.

Cruise Ships comprised the second largest mode use market, representing (37%) or 306,200 visitors to Alaska, with only slightly more visitors traveling round-trip than one-way.

Highway use accounted for 14% of the total visitor market, followed by Ferry (5%) and International Air (3%). Although overall more visitors used a single transportation mode for round-trip transportation, Ferry and International Air visitors were more likely to be one-way users.

Vacation/Pleasure (VP) Visitors

Domestic Air market share was the largest among Vacation/Pleasure visitors also, with slightly more than half (52%) of VPs traveling round-trip and one-way via Domestic Air. VPs traveling by Domestic Air were nearly as likely to travel round-trip as one-way by domestic carriers.

Cruise Ship mode use attained nearly the same market size (51%) as Domestic Air among VPs. Vacation/Pleasure visitors were slightly more likely to travel round-trip than one-way by Cruise Ship.

VPs were more likely than all visitors to Alaska to travel by Highway and Ferry. More than three-quarters (78%) of visitors traveling by Highway were round-trip users, while 79% of visitors traveling via Ferry were one-way users. International Air use represented 3% of the total VP market, with slightly more one-way VP users than round-trip users.

Summary Table VI

**Transportation Mode Market Size
For all Visitors
Summer 1993**

Transportation Mode	One-Way Users	Round-Trip Users	Total Users	Total Users As % of Visitor Market
Domestic Air	163,900	368,100	532,000	52 %
Cruise Ship	139,200	167,000	306,200	30
Highway	26,900	92,300	119,200	12
Ferry	28,500	11,600	40,100	4
International Air	12,500	10,700	23,200	2
Other/Don't Know	3,400	—	—	—
Total Visitors	374,400 **	649,700	836,900	100 %

*Total number of visitors using each mode for entry and exit. For example: 163,900 visitors used Domestic Air one way for either exit or entry. In addition 368,100 visitors used Domestic Air for both entry and exit. Therefore, the total number of Domestic Air users is 532,000.

**Total one-way users is half the number of one-way mode users. For example: 374,400 visitors used 748,800 one-way modes to enter and exit Alaska.

Summary Table VII

**Transportation Mode Market Size
For Vacation/Pleasure Visitors
Summer 1993**

Transportation Mode	One-Way Users	Round-Trip Users	Total Users	Total Users As % of Visitor Market
Domestic Air	152,900	159,000	311,900	41 %
Cruise Ship	136,400	164,800	301,200	39
Highway	23,300	81,400	104,700	14
Ferry	26,100	7,000	33,100	4
International Air	8,800	7,400	16,200	2
Other/Don't Know	1,700	—	—	—
Total Visitors	349,200	419,600	594,200	100 %

*Total number of visitors using each mode for entry and exit. For example: 152,900 visitors used Domestic Air one way for either exit or entry. In addition 159,000 visitors used Domestic Air for both entry and exit. Therefore, the total number of Domestic Air users is 311,900.

**Total one-way users is half the number of one-way mode users. For example: 349,200 visitors used 698,400 one-way modes to enter and exit Alaska.

Visitor Arrivals by Origin

The United States was the primary source of visitors to Alaska, producing 83% of all summer visitors. The West contributed 37% of summer visitors, followed by the South with 20%, Midwest with 15% and the East with 10%. California and Washington have been and remain the top producing states generating 14% and 10% of Alaska visitors, respectively.

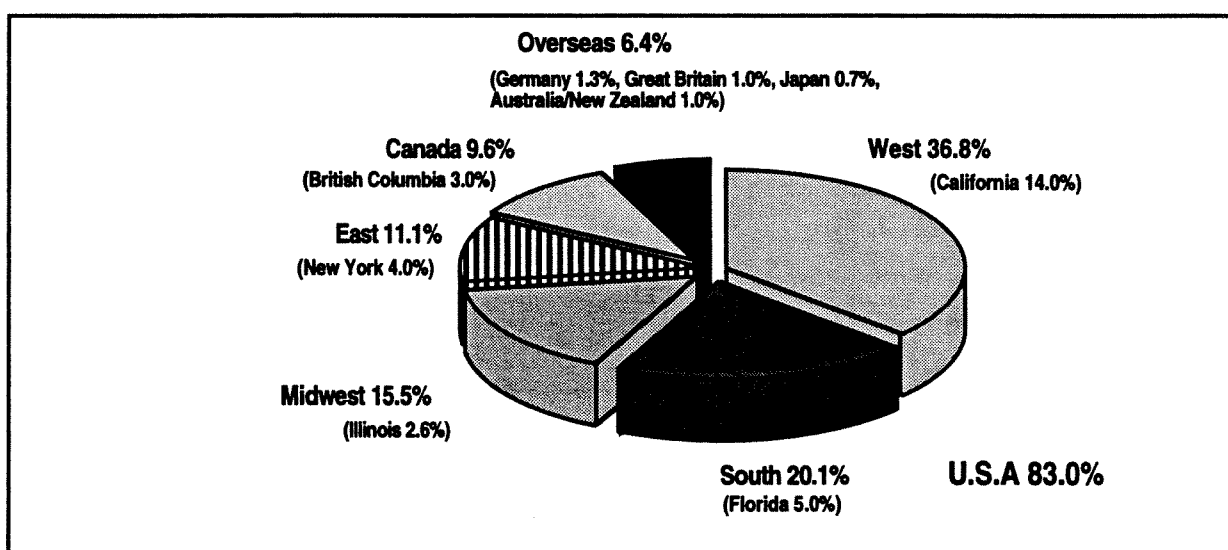
Canada produced close to 10% of Alaska visitors. Top producing Canadian regions were British Columbia (3%) and Yukon (2%).

Overseas visitors comprised 6% of the total visitors. Four percent of all Alaska visitors originated in Europe. The Pacific Region, which includes Japan and Australia/New Zealand, generated 2% of all Alaska visitors.

Visitor origin patterns, overall, have remained consistent over the past four years. Slight shifts have occurred regionally in the United States, but the United States has historically produced over eight in ten visitors. However, while visitor proportions have remained constant, the actual number of visitors from all parts of the world, U.S., Canada and Overseas, has increased significantly in the past four years. For example, Overseas visitors have increased by 57% and U.S. visitors have increased 36% during this period.

Summary Graph V

Visitor Origin All Visitors Summer 1993



Vacation/Pleasure Visitor Arrivals by Origin

Eight in ten Vacation/Pleasure visitors originated in the United States, primarily from the West (30%), followed by the South (21%), Midwest (17%), and the East (12%). California and Washington remained among the top producing states generating 14% and 6% of Alaska Vacation/Pleasure visitors, respectively.

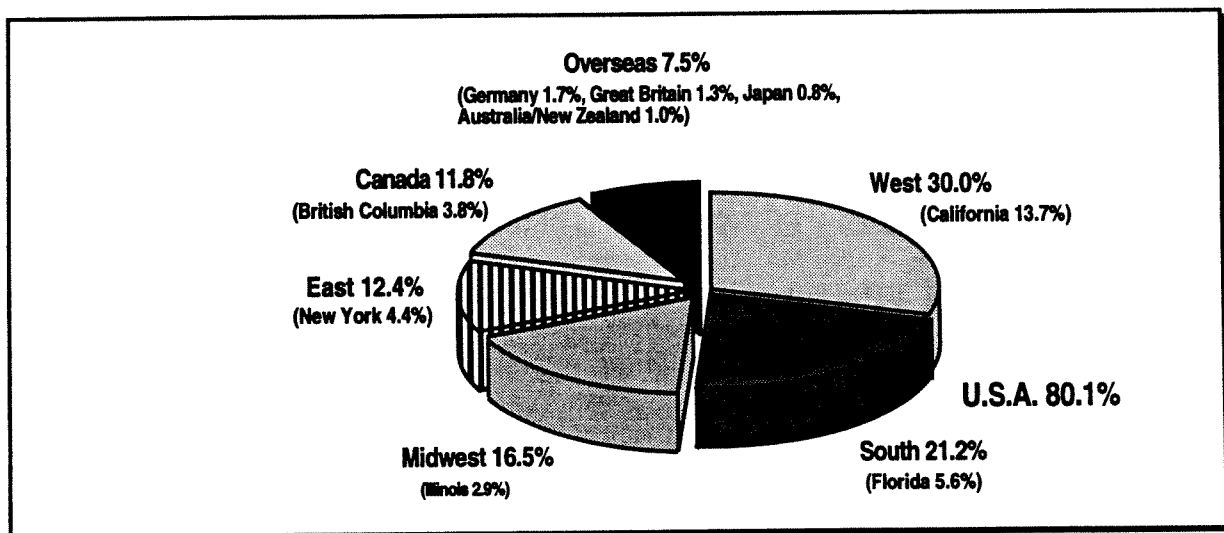
Canada produced nearly 12% of Vacation/Pleasure visitors, with the largest proportions arriving from British Columbia (3.8%) and Yukon (2.4%).

Nearly 8% of Summer 1993 Vacation/Pleasure visitors originated Overseas, primarily from Europe (4.7%). The Pacific Region, which includes Japan and Australia/New Zealand, comprised 2.1% of Overseas VPs.

Overall, nine in ten Vacation/Pleasure visitors originated in the U.S. and Canada. VPs from Overseas have doubled in the past four years and comprised nearly one in ten VP visitors in Summer 1993. Most VPs still originated from the West, however, the proportion of VPs from the West has declined since Summer 1989, while the proportions from the South and East have grown.

Summary Graph VI

**Visitor Origin
Vacation/Pleasure Visitors
Summer 1993**



Visitor Characteristics

All Visitors

More than half (57%) of all visitors intended to travel as Independent travelers, with the remaining (44%) traveling on a Package tour, similar to Summer 1989.

Intended length of stay for Alaska visitors during Summer 1993 was 10.2 nights, slightly less than the Summer 1989 average intended stay of close to 11 nights.

The average party size was 2.1 people, down slightly from 2.2 in Summer 1989.

One-third of all visitors have visited Alaska in the past. Slightly more than two in ten have been to the state for pleasure and just over one in ten for business.

The average age of Alaska visitors in Summer 1993 was 48 years, one year higher than in Summer 1989.

Slightly more males than females traveled to Alaska (53% versus 47%), again similar to the previously sampled summer.

Over half (56%) of visitors to Alaska were employed, while one-third were retired.

Vacation/Pleasure Visitors

Nearly six in ten (58%) of Vacation/Pleasure visitors traveled on a packaged trip. Four in ten (42%) VPs were independent travelers, with 14% planning to purchase sightseeing while in Alaska.

Vacation/Pleasure visitors intended to stay 9.4 nights during Summer 1993, the same as in Summer 1989, and slightly shorter than the average visitor.

The average party size for Vacation/Pleasure visitors was 2.2 people, down slightly from previously sampled years.

Two in ten (21%) VPs have been to Alaska in the past five years, primarily for vacation. Only 2% of VPs visited Alaska for business in the past five years.

The average VP visitor was 50 years old in Summer 1993, the same as in previously sampled years.

VPs are just as likely to be male as female, and more likely to be employed (50%) than retired (38%).

Summary Table VIII

**Visitor Characteristics
All Visitors and Vacation/Pleasure Visitors
Summer 1993**

	All Visitors	Vacation/Pleasure Visitors
Intended Travel Type		
Package	44 %	58 %
Independent Total	57	42
Independent	44	28
Inde-Package ¹	13	14
Intended Stay		
0 Nights	1 %	1 %
1-2	7	5
3-6	39	42
7-13	31	33
14-20	12	12
21+	10	8
Average # of Nights	10.2	9.4
Party Size²		
Average	2.1	2.2
Repeat Visits by Trip Purpose		
For Pleasure	23 %	20 %
For Business	14	2
Repeating, Total	33	21
Age		
Under 18	6 %	6 %
18-24	5	3
25-34	11	9
35-44	16	14
45-54	19	18
55-64	19	22
65-74	19	22
75+	6	7
Average	47.6	50.2
Gender		
Male	53 %	50 %
Female	47	50
Employment Status		
Employed	56 %	50 %
Retired	33	38
Other	12	12

¹Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.
²Computed excluding parties of 10 or more.

Marketing Trends and Implications

Over the years of data collection, the AVSP has documented the Alaska visitor market and its changes. The *Random Arrival Survey* is the first of the three surveys conducted as part of the AVSP and provides basic information about visitors to Alaska. This ten question survey yields important insights into visitor travel intentions, such as how long they plan to stay, and demographic information, such as age and origin. Of particular value is the opportunity to compare Summer 1993 data with previously sampled summers. Through spotting trends, this information can be used to gain a more complete understanding of the Alaska visitor market. The following discussion outlines the key trends found in the data and their implications for marketers.

- 1) **Alaska visitor market growth has accelerated in recent years.** Overall growth between Summers 1989 and 1993 was 39%, or an annual average of nearly 9% per year. On the other hand, growth between Summers 1985 and 1989 was only 14%, or an annual average of 3% per year. This growth primarily occurred between Summers 1985 and 1986, when EXPO '86 drew a record number of visitors to Alaska. Overall, the visitor market has grown close to 60% since Summer 1985. Vacation/Pleasure visitors have nearly doubled in the same time period, growing 87%.

This significant growth in recent years signals the tremendous interest in Alaska as a destination generated by successful public and private marketing programs. It is also a sign that Alaska's infrastructure which serves the visitor industry is also growing to meet the demand.

The overall Summer season market has gained considerable momentum in recent years. Strong growth in the near term is likely to continue, particularly among pleasure-related visitors, stressing capacities of existing visitor-related facilities during these months. The implication is clear: Alaska must seriously concern itself about the quality of the visitor experience as well as the marketing of Alaska to potential visitors. The *Visitor Opinion Survey*, which will be presented in the third report of this series (May 1994), will detail visitor opinions about the quality of their experiences with all aspects of their trip.

- 2) **Vacation/Pleasure (VP) visitors are a growing portion of the overall visitor market.** Since Summer 1985, VPs have grown from 61% to 71% of the total visitor market. While all visitor markets have experienced some growth, VPs have grown at a much faster rate. To a large degree, this is due to a rapidly growing cruise ship industry and package tour market. However, independent visitors are also growing rapidly, although not as fast as the package tour market.

The Vacation/Pleasure visitor market is the dominant trip purpose group during the summer months of May through September and its increased size suggests that marketing efforts are successful. It is likely this portion of the visitor market will continue growing faster than other trip purpose segment.

Business visitor segments are directly related to economic growth in the state, while the visiting friends and relatives segment growth is tied to the growth of the Alaska population. Neither of these groups is expected to grow as rapidly as VPs.

VPs have been and will continue to be the most important trip purpose group in terms of overall size and economic impact in the state. This group will also drive the types of visitor facilities which are developed as a result of their growth.

- 3) **Subtle shifts are occurring in the overall Alaska visitor market, both in terms of visitor and trip characteristics.** This is particularly true among Vacation/Pleasure visitors. Although entry and exit mode use, intended travel type, repeat visits, and average visitor age have not changed significantly in the past four summer seasons, other characteristics have. Those characteristics where the most notable shifts have taken place include intended length of stay, party size, employment and origin.

Intended Length of Stay: During Summer 1985 the average intended length of stay was 12.7 nights. This dropped to 10.9 nights during Summer 1989. By Summer 1993, intended length of stay dropped to 10.2 nights. This trend mirrors national vacation trends which continue to reflect shorter vacations. Visitor length of stay in Alaska is in part market driven and in part product driven. The rapid growth of cruise volume and cruise itinerary length (generally seven days) have influenced these average length of stay figures. Marketers should be aware that for the bulk of the Alaska market, time is at a premium and this market in the future will likely prefer shorter (less than two weeks) rather than longer vacation itineraries. Both the *Visitor Expenditure Survey* and the *Visitor Opinion Survey* will confirm actual length of stay for visitors.

Party Size: Overall average visitor party size dropped from 2.4 in Summer 1989 to 2.1 in Summer 1993. Vacation/Pleasure average visitor party size only dropped from 2.4 in Summer 1989 to 2.3 in Summer 1993. Visitor party size tends to fluctuate and 1993 figures suggest that more visitors are traveling in parties of one or two than in either 1989 or 1985. Alaska has been and continues to be a destination which attracts smaller visitor parties rather than larger. Future party size is likely to remain between 2.0 and 2.5 persons on average. These party sizes suggest that Alaska is not capturing much of the growing family travel market, although it is possible Alaska may begin to capture more of this market in the future. A new family-oriented cruise product is scheduled to appear on the Alaska cruise scene in 1995. Other family-oriented travel products in the state are beginning to be developed. To successfully develop this market, however, marketers of Alaska travel products will need to meet the unique needs of traveling families, as well as overcome the perception that Alaska is a high-priced destination.

Employment: Slight shifts in the proportion of visitors employed versus retired reflect the younger market now visiting the state. Younger visitors are more likely to be employed than retired. This is particularly true among Vacation/Pleasure visitors, where half of VPs are employed and close to one-third are retired. In 1985, VPs were 45% employed and 46% retired. The shorter length of stay is also a reflection, in part, of younger and fewer retired visitors.

Origin: The West, which is historically the largest volume producer, has declined in the proportion of visitors it produces, from 50% of all visitors in Summer 1985 to 37% of all visitors in Summer 1993. Still, the West represents the largest source of visitors.

All other major areas grew in proportion in the past four years, particularly the Southern United States and Canada. Overseas visitors grew slightly in proportion, but nearly doubled in volume. Clearly, marketing efforts in general have been working to generate visitors from all regions of the United States, as well as Canada and Overseas. Closer examination of specific states, Canadian provinces and Overseas markets found in the body of this report will provide direction for further marketing efforts.

- 4) **International visitors now rely on domestic entry modes more than ever before.** Overseas visitors to Alaska have increased significantly in the past eight years. In the past four summers alone, the market overall has grown from 31,500 visitors to 53,500. With the declining international stopover flights through Anchorage, foreign visitors have begun to rely more heavily on domestic entry and exit modes. During Summer 1989, one-half of Overseas visitors used International Air to enter the state. By Summer 1993, only one-fifth of Overseas visitors were arriving by this mode. As a result, Domestic Air use by foreign visitors increased from 14% in Summer 1986 to 36% in Summer 1993. Cruise, Highway and Ferry entry and exit mode use increased as well.

The heavier use of domestic entry and exit modes by Overseas visitors is a major travel pattern shift from previous years. With the decrease in direct flights from Europe and Asia to Anchorage, foreign visitors have been finding their way to Alaska through other means. Although weekly charter flights from Europe were inaugurated during Summer 1992 and continued during Summer 1993 with some success, heavier use of domestic modes is likely to continue.

Businesses interested in capitalizing on the various overseas markets need to be aware of this travel pattern shift. Now, more than ever, marketers need to provide potential foreign visitors with detailed information on transportation alternatives to and from the state. Further, interested marketers should take advantage of cooperative marketing opportunities through the Division of Tourism, regional marketing organizations and local convention and visitors bureaus, as well as national tour operators who provide destination packages to potential overseas visitors.

Chapter I: Arrivals

Chapter I: Arrivals

Total Arrivals

Visitor Arrivals

***Resident/Visitor Arrival Composition
Visitor Arrivals by Entry Mode***

Arrivals

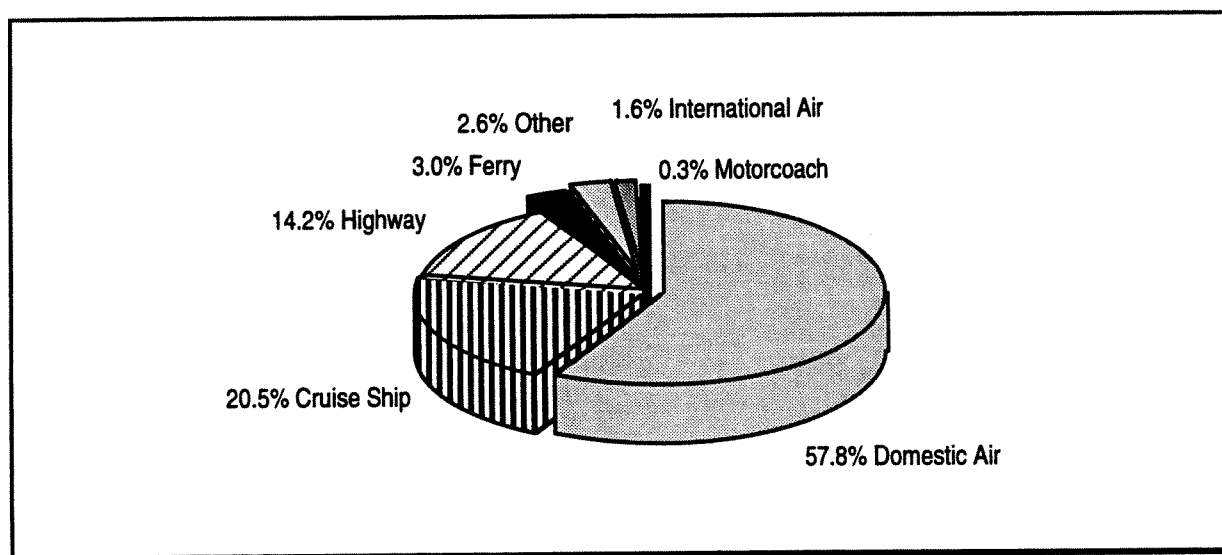
Total Arrivals

Total arrivals for Summer 1993 reached a high of 1.2 million travelers to Alaska. For the first time since the *Alaska Visitor Statistics Program's* (AVSP) inception, the month of May was included in the Summer sample period (June-September). Even without the addition of May to summer, total arrivals to the state exceeded 1 million – a 70% increase over total arrivals to the state in 1985 and a 4 % increase over Summer 1992.

Domestic Air brought the most visitors to Alaska: 697,000 during Summer 1993, a slight gain (1%) over Summer 1992. Domestic Air passengers comprised nearly 58% of all arrivals to Alaska. Cruise Ship continued to be the second most important entry mode bringing 20% of all visitors in Summer 1993. Highway mode followed bringing in 14% of Alaska's summer entries. The state ferry system showed a small decline. International Air, though bringing only 2% of the total market, posted a 5% increase over summer 1992. The increase was largely due to an increase in charter traffic.

Graph I-A

**Total Arrivals
By Entry Mode
Summer 1993**



Arrival data was collected directly from domestic airlines (through a confidential reporting system), the Anchorage International Airport Manager's office, the Alaska Marine Highway System Traffic Manager's office, U.S. Customs at Skagway and Poker Creek (Taylor Highway), the U.S. Immigration and Naturalization Service for the Alaska Highway and Cruise Line Agencies of Alaska.

Table I-A

Total Arrivals
Total Passengers Entering Alaska
(Residents and Visitors Combined)
Summer 1993

Mode	May	June	July	August	September	Total	Percent Change 1992-93
Domestic Air¹	101,430	161,015	174,846	170,990	89,170	697,451	+1.2 %
Anchorage	79,325	125,202	135,598	130,826	69,945	540,896	+2.9 %
Other	22,105	35,813	39,248	40,164	19,225	156,555	-4.2 %
International Air²	2,146	3,543	4,556	5,811	3,402	19,458	+5.1 %
Scheduled	1,683	2,716	3,104	2,995	2,225	12,723	-15.1 %
Charter	463	827	1,452	2,816	1,177	6,735	+91.5 %
Cruise Ship Total³	29,514	60,337	58,275	64,610	34,231	246,967	+16.5 %
Arriving Ketchikan	20,971	34,833	36,638	37,077	20,704	150,223	+4.5 %
Arriving Juneau	5,628	16,287	14,880	17,751	10,459	65,005	+50.8 %
Arriving Sitka	1,894	4,222	4,722	4,666	1,081	16,585	N/A
Arriving Skagway	1,021	4,995	2,035	5,116	1,987	15,154	+25.7 %
Highway Total⁴	18,901	40,973	55,848	42,797	17,696	176,215	+0.3 %
Alcan & Poker Creek							
Personal Vehicle	9,544	25,071	31,830	24,587	9,412	100,444	0.7 %
Motorcoach ⁵	92	1,221	1,287	753	146	3,499	4.3 %
Skagway							
Personal Vehicle	9,224	14,511	22,437	17,340	8,116	71,628	+2.3 %
Motorcoach	41	170	294	117	22	644	-75.1 %
Alaska Marine⁶							
Highway Total	3,995	8,937	11,336	8,753	2,884	35,905	-0.2 %
Departing Bellingham	1,989	2,898	4,099	3,252	1,244	13,482	-0.1 %
Departing Prince Rupert	2,006	6,039	7,237	5,501	1,640	22,423	-0.2 %
Other⁷	4,466	7,939	7,302	7,574	4,251	31,532	-3.3 %
Total Arriving Passengers⁸	160,452	282,744	312,163	300,535	151,634	1,207,528	+3.8 %
% of Change By Month 1992-93	-2.9 %	+1.1 %	+3.6 %	+6.4 %	+12.3 %	+3.8 %	

Footnotes For Table I-A

Important note: Arrivals are defined as passengers entering Alaska at their first point of entry, not as the total number of users of each mode. For example, the total number of Cruise Ship users is approximately 317,000 of which 246,967 entered Alaska on a Cruise Ship. The balance used a Cruise Ship after entering the state by another mode, usually Domestic Air. Further, the number of first arrivals shown at each entry point are only those using that point for their first stop. In Anchorage, for example, 540,900 passengers entered the state on Domestic Air carriers which landed first at Anchorage. Several times that number transited in and/or out of Anchorage by air from instate locations.

¹ Domestic Air totals include both scheduled and charter flights by domestic carriers.

² International Air totals include both scheduled and charter flights by international carriers.

³ Cruise Ship arrivals are listed by the first point of entry after entering Alaska waters northbound.

⁴ Highway Personal Vehicle totals include all passengers passing into Alaska through U.S. Customs stations on Alaska, Taylor and Klondike Highways. These totals include passengers arriving in Alaska at their first point of entry and those previously entering Alaska at other points, such as on the Ferry in Southeast Alaska before driving into mainland Alaska. Those passengers not arriving by Highway as their first point of entry are screened out by the AVSP survey process and are not double counted in the following visitor totals. Passengers entering Alaska on the Klondike Highway who first visited mainland Alaska are also screened out by the survey process.

⁵ Highway Motorcoach arrivals are first arrivals only and, unlike the Personal Vehicle arrivals, do not include Motorcoach passengers who first entered Alaska at another point of entry. Motorcoach first arrivals are those passengers traveling from their point of origin entering Alaska first via Highway at the Alcan, Taylor and Klondike highways U.S. Customs stations.

⁶ Marine Highway arrivals are the number of passengers on board as the ferries pass northbound into Alaska waters from the two outside points of departure, Prince Rupert, B.C. and Bellingham. The total does not, of course, include users of the system boarding within Alaska.

⁷ Other arrivals includes first arrivals at minor points of entry not surveyed. This includes Domestic Air first arrivals at locations other than Ketchikan, Juneau, Anchorage and Fairbanks; some private vessel and aircraft arrivals; commercial truck passengers through Alcan, Taylor and Klondike checkpoints and a statistical adjustment to prevent disclosure of individual carrier volume. This does not include Skagway truck driver volume (which is substantial due to mining activity originating in the Yukon) or crew members of all other passenger transportation modes.

⁸ Totals include Skagway arrivals. Skagway arrivals via the Klondike Highway were surveyed for the first time in 1989, and again in 1993, these arrivals are included in the totals but comparisons of Skagway arrivals prior to 1989 are not possible.

Visitor Arrivals

To determine the ratio of residents to visitors entering Alaska, each transportation mode was randomly sampled. For example, all air passengers arriving in Juneau from Seattle on a sampled flight were asked, "Are you a resident or non-resident of Alaska?" as they deplaned. A tally was kept of residents and non-residents for each flight on each sample day at each location. This tally was used to calculate the resident/non-resident ratio. A similar process was used for each of the five main entry modes.

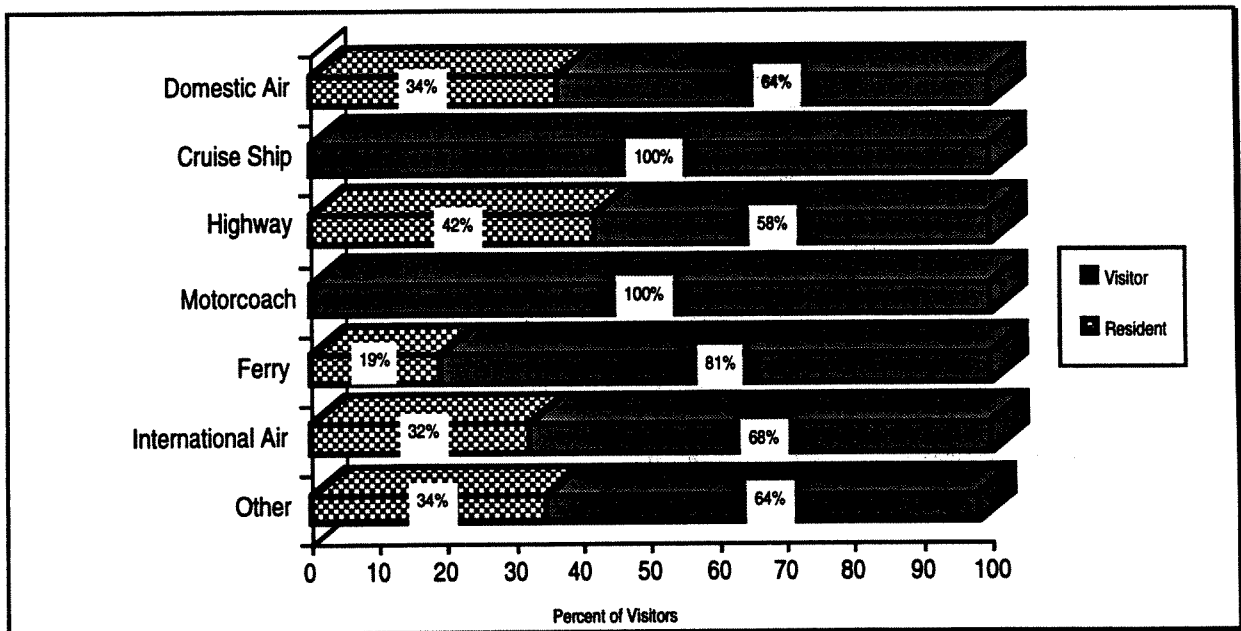
Resident/Visitor Arrival Composition

Non-residents (visitors) made up the greatest portion of arrivals to Alaska during Summer 1993. Visitors comprised 71% or 836,920 of the 1.2 million summer arrivals. The visitor/resident composition was similar to past AVSPs. Visitor proportions ranged between 69% and 73%.

Cruise Ship and Motorcoach were 100% visitors. The State Ferry system followed with 81%. International Air visitor proportions, though high, decreased from 82% in 1989 to 68% in 1993 largely due to changes in international traffic patterns. Domestic Air maintained the same resident visitor proportion as in previous years (64%) and brought in the greatest number of visitors to the state.

Graph I-B

**Resident/Visitor Arrival Composition
By Entry Mode
Summer 1993**



Visitor Arrivals By Entry Mode

Domestic Air was the most popular entry mode to Alaska, carrying more than half of all visitors to the state. Cruise Ship followed bringing more than one-quarter of all visitors to Alaska. Highway brought one-eighth of Alaska's summer visitors and Ferry and International Air brought the smallest proportion of visitors to Alaska.

The proportion of Domestic Air visitors to Alaska showed little change between 1989 and 1993. Cruise percentages, however, increased nearly 3%. The proportion of Highway entries stayed the same as previous years while Ferry and International Air percentages dropped slightly between 1989 and 1993.

Only 3% of total arrivals to the state were not sampled. These included Motorcoach entries at the Alaska, Taylor and Klondike highways, Domestic Air arrivals to locations such as Wrangell, Petersburg, Sitka, Cordova and Yakutat, and private vessel and aircraft arrivals. Visitor arrivals for the unsampled locations were estimated using past survey results and secondary research. Table I-B gives the breakdown of residents and visitors by entry mode for sampled and unsampled visitors.

Table I-B

Visitor Arrivals by Entry Mode Total Visitors Sampled and Unsampled* by AVSP Survey Summer 1993

Sampled Arrivals	Total Arrivals	% Visitors	# of Visitors	% of Total Visitors
Domestic Air	697,451	63.6 %	443,642	51.5 %
Cruise Ship	246,967	100.0	246,967	28.7
Highway-Personal Vehicle	172,072	60.4	103,972	12.1
Ferry	35,905	81.0	29,075	3.4
International Air	19,458	68.2	13,264	1.5
Total Sampled Arrivals	1,171,853	71.4 %	836,920	97.2 %
Unsampled Arrivals				
Highway-Motorcoach	4,143	100.0	4,143	0.5 %
Other	31,532	63.6	20,054	2.3
Total All Arrivals	1,207,528	71.3 %	861,117	100.0 %

***Note:** All study results following Table I-B are of **sampled visitors only**. By definition, the remainder of this report deals with the nearly 97% of all visitor flows sampled in the survey process.

Entry Mode Visitor Trends Total Visitors Entering Alaska - Summers 1985 - 1993

Entry Mode	Summer 1985	Summer 1986	Summer 1987	Summer 1988	Summer 1989	Summer 1990	Summer 1991	Summer 1992	Summer 1993	Percent Change 1985-1993
Domestic Air	240,622	256,673	231,700	242,900	283,400	318,400	344,595	361,825	392,138	+63.0 %
International Air	9,000	10,732	11,800	14,850	16,400	17,800	16,555	14,015	12,498	+38.9 %
Cruise Ship Total	139,849	163,444	163,500	160,800	143,600	175,200	174,447	188,270	217,453	+55.5 %
Marine Highway Total	21,536	24,649	23,800	26,550	25,100	25,900	26,830	24,780	26,478	+22.9 %
Highway Total										
Alcan/Taylor Personal Vehicle	46,766	54,310	44,100	48,400	45,200	47,900	45,464	49,492	62,800	+34.3 %
Motorcoach ¹	3,800	3,646	3,400	3,000	3,700	3,200	4,092	2,528	3,407	-10.3 %
Other ²	11,800	12,602	12,000	12,800	13,700	14,600	12,827	13,824	17,809	+50.9 %
Total Visitors Excluding Skagway ³	473,373	526,056	490,300	508,300	531,100	603,000	624,810	654,734	732,583	+54.8 %
Skagway Personal Vehicle and Motorcoach	23,900	26,800	25,000	27,000	28,200	26,700	26,908	39,859	29,636	+24.0 %
Total Visitors Including Skagway ⁴	497,273	552,856	515,300	536,300	559,300	629,700	651,718	694,593	762,219	
% Change		+11.2 %	-6.8 %	+4.1 %	+4.3 %	+12.6 %	+3.5 %	+6.6 %	+9.7 %	+53.3 %

¹Motorcoach arrivals were sampled in Summer 1985. Summer 1986 through 1993 motorcoach arrivals are estimates based on the number of motorcoaches entering Alaska at their first point of entry.

²Other Domestic Air arrivals were not sampled from Summer 1985 through 1993. Visitor arrivals were estimated for the small volume of Domestic Air arrivals at locations other than the four sample points, and private vessel and aircraft arrivals at select locations.

³Skagway arrivals were sampled for the first time during Summer 1989. In order to compare results from 1985-88, Summer 1989 and 1993 data has been prepared without Skagway arrivals. In addition, data is also presented without May which was included in the summer sample for the first time during Summer 1993.

⁴Skagway arrivals were sampled for the first time during Summer 1989. Visitor arrivals from Summer 1985-88 are estimated for purposes of year-to-year comparison. Data is also presented without May which was included in the summer sample for the first time during Summer 1993.

Chapter II: Visitor Overview

Chapter II: Visitor Overview

Trip Characteristics

Trip Purpose

Entry & Intended Exit Transportation Modes

Intended Travel Type

Intended Length of Stay

Visitor Characteristics

Repeat Visits

Visitor Origin

Party Size

Demographics

Age

Gender

Employment Status

Visitor Overview

Introduction

The second step of the survey process was to identify a random sample of visitors to participate in the *Random Arrival Survey* questionnaire on each of the AVSP's five entry modes. The selected visitors were interviewed by professionally trained, uniformed interviewers. The interviews lasted approximately two to three minutes. The remainder of this report presents the results from the *Random Arrival Survey* (RAS).

Since this chapter contains data pertaining to sampled visitors only, readers will find some entry mode totals to be slightly less than the totals presented in the Arrivals chapter. The Arrivals chapter contains the 97% of all sampled arrivals as well as the three percent who were not part of the total sample. For instance in Chapter I the visitor arrivals total was 861,117. Survey results indicated that the total visitor arrivals were 836,920. The purpose of this chapter and those remaining is to present survey results derived from the RAS.

RAS data was collected from visitors prior to making their Alaska trip and represents visitor intentions for exit mode, travel type, and length of stay. Many visitors were uncertain of their final decision for these items when first arriving in Alaska. Actual exit mode, travel type and length of stay results were collected utilizing the *Visitor Opinion Survey*, the third AVSP survey instrument. This information will be included in *Patterns, Opinions and Planning*, the third of the AVSP III summer series reports.

The *Random Arrival Survey* (RAS) contained questions that defined ten visitor characteristics which were divided into two categories, trip characteristics and visitor characteristics.

Trip Characteristics

Trip Purpose
Intended Entry/Exit Transportation
Mode
Intended Travel Type
Length of Stay

Visitor Characteristics

Repeat Visit Rate
Visitor Origin
Party Size
Visitor Age
Visitor Gender
Visitor Employment Status

Trip and Visitor characteristic data was derived from 3,872 personal intercept surveys representing 836,900 visitors who arrived in Alaska in Summer 1993.

Trip Characteristics

Trip Purpose

The Vacation/Pleasure (VP) visitor market dominated all trip purpose groups totaling 594,200 visitors. The VP market share has grown continually increasing to an all time high of 71% (from 61% in 1985 and 66% in 1989). The Visiting Friends and Relatives (VFR) held the second largest market share in Summer 1993 (11%) followed closely by the Business Only (BO) market (10%).

Though overall numbers increased between 1989 and 1993 for all trip purpose groups, market shares shifted. VFR, Business and Pleasure (BP) and Seasonal Worker (SW) market shares declined slightly between 1989 and 1993.

Graph II-A

**Visitors by Trip Purpose
Summer 1993**

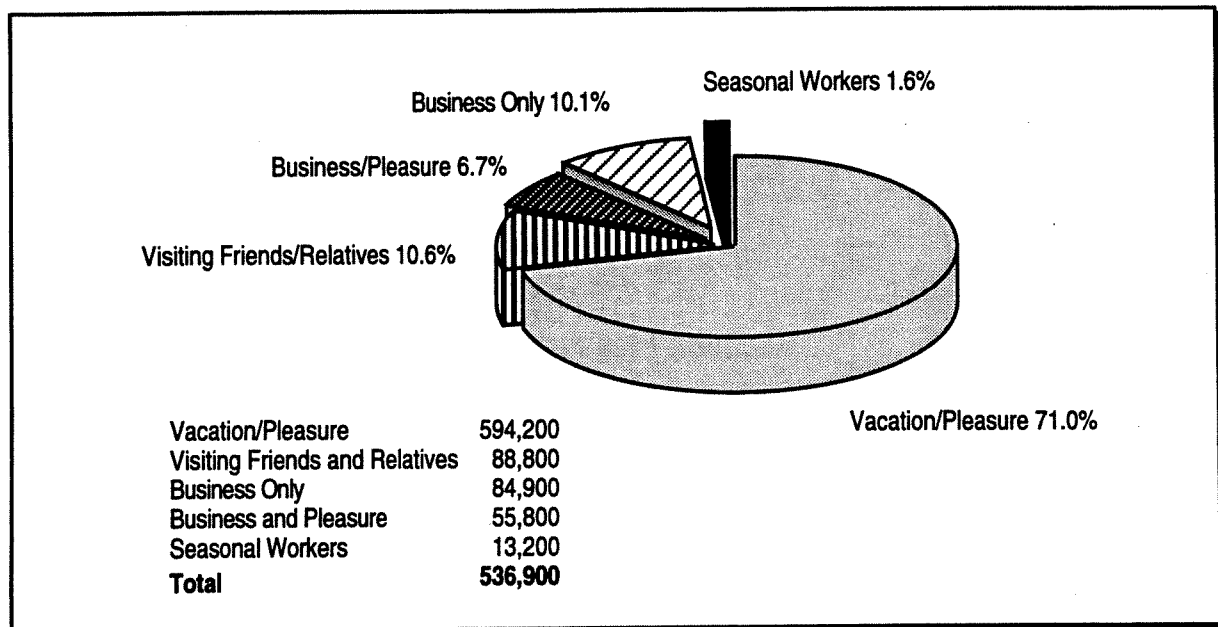


Table II-A

**Visitor Arrivals by Main Trip Purpose
Summer 1993**

Trip Purpose		Number of Visitors
Vacation Pleasure		594,200
Visiting Friends and Relatives		88,800
Pleasure Related Total		683,000
Business and Pleasure		55,800
Business Only		84,900
Seasonal Workers		13,200
Business Related Total		153,900
Total Visitors		836,900

Vacation/Pleasure Visitor Market (VP)

VP visitors are the major component of the Alaska visitor industry. Vacationers are most likely to be impacted by marketing programs implemented by the State of Alaska Division of Tourism, the Alaska Tourism Marketing Council and by private sector tourism businesses and other organizations. As a result, additional emphasis will be placed on this trip purpose group. Other trip purpose groups will also be discussed, but in less detail.

The VP market possessed the largest share of the visitor market during Summer 1993 claiming nearly three-quarters of the summer visitors. The vacation market carried even greater value if the total VP market, including primary and secondary markets, was considered. Many visitors came to Alaska for more than one reason. For instance, some VP visitors indicated that their primary purpose was for vacation and that another reason for traveling to Alaska was to visit with friends.

The total pleasure market included those whose main trip purpose was to Visit Friends and Relatives but said they would sightsee in other parts of the state (46% of VFRs) and also encompassed two-thirds of all BP visitors who stated they would add days for pleasure-related activities. The total VP visitor market for Summer 1993 was 672,300 a substantial increase from 1989.

Table II-B

Vacation/Pleasure Visitor Market Summer 1993

Primary Market	
Visitors with Vacation/Pleasure as Main Trip Purpose	594,200
Secondary Markets	
VFR Visitors with Vacation/Pleasure as Secondary Trip Purpose (46% of all Visit Friends & Relatives Visitors)	40,800
Business & Pleasure Visitors with Vacation/Pleasure as Secondary Trip Purpose (67% of all Business & Pleasure Visitors)	37,300
Total Vacation/Pleasure Visitor Market	672,300

Visit Friends and Relatives Visitor Market (VFR)

VFRs were the second most important market for Alaska tourism. In Summer 1993, 11% of those interviewed indicated their main trip purpose was to visit with friends and family. Additionally many incorporated pleasure activities on their trip. These visitors could have been influenced by marketing programs implemented in the areas they visited.

Secondary market groups increased the total clout of the VFR market. An additional 114,000 (19% of all VPs) claimed that visiting friends and relatives was one of their motives for traveling to Alaska. Also, 30% whose main trip purpose was BP indicated their secondary trip purpose included Visiting Friends and Relatives. The total VFR market for Summer 1993 including primary and secondary markets was 220,700.

Table II-C

**Visit (Alaska) Friends and Relatives Visitor Market
Summer 1993**

Primary Market	
Visitors with Visiting Friends and Relatives as Main Trip Purpose	88,800
Secondary Markets	
Vacation/Pleasure Visitors with VFR'ing as Secondary Trip Purpose (19% of all Vacation/Pleasure Visitors)	114,300
Business & Pleasure Visitors with VFR'ing as Secondary Trip Purpose (31% of all Business & Pleasure Visitors)	17,600
Total Visit Friends & Relatives Visitor Market	220,700

Business Visitor Market

The business visitor market contributed greatly to Alaska's travel industry, but was not influenced by Alaska's marketing programs which are primarily geared toward pleasure visitors. Business was the sole reason for travel to Alaska for 10% of all summer visitors. Another 7% traveling for business and pleasure but not adding days to their trip increased the size of the business market.

Secondary markets increased the overall business market's affect on Alaska tourism. BPs adding pleasure days to their trip totaled 37,000 and SWs supplied an additional 13,000 visitors to this group. The total business visitor market for Summer 1993 was 151,700.

Table II-D

**Business Visitor Market
Summer 1993**

Primary Markets	
Visitors with Business Only as Main Trip Purpose	84,900
Business & Pleasure Visitors not adding days to their trip for Pleasure purposes (29% of all Business & Pleasure Visitors)	16,300
Secondary Markets	
Business & Pleasure Visitors adding days to their trip for Pleasure purposes (67% of all Business & Pleasure Visitors)	37,300
Seasonal Workers	13,200
Total Business-Related Markets	151,700

Trip Purpose Trends

VP visitors have shown the greatest increase overall. VPs nearly doubled between 1985 and 1993 with the majority of the growth during the past four summer seasons. Their annual growth rate between 1989 and 1993 was over 11%. Alaska attracted large quantities of vacation visitors with aggressive marketing programs and benefited from tourism industry events such as EXPO in 1986 and the 50th Anniversary of the building of the Alaska Canada Highway in 1992. Notoriety attained from such events as the March 1989 oil spill and the whales trapped in the ice also turned the spotlight on Alaska.

Overall VFR visitors grew slightly between 1985 and 1993 (1%). Market growth was slowed by a decrease experienced in 1986. VFRs rose again in 1989. However, between 1989 and 1993 VFRs decreased 5%. It is notable that VFRs decreased during the same period that VPs experienced their greatest increase.

Since the first AVSP in 1985, BOs have hovered at around 10% of all visitors dipping only in 1989 to 7%. BO numbers were affected by economic factors within and outside of Alaska. The recession also contributed to the subsequent ups and downs. BOs rebounded in 1993 to nearly 10% coinciding with Alaska's renewed economic growth. A more positive outlook following national elections in Fall of 1992 and the gradual rebuilding of the nation's economy after the recession also contributed to an increase in BO traffic.

BP numbers varied significantly since 1989 dropping 3%. The slack may have been picked up by the BOs which increased in the same period. National economic conditions resulted in streamlining of business operations. It is possible that this affected business travelers, making it more difficult for them to add pleasure related activities to business trips.

SWs were also affected by economic trends. Overall SW numbers have declined. Between 1989 and 1993 there was a 33% decrease. SW visitors were only 1% of all visitors to Alaska in Summer 1993.

Table II-E

Visitors By Trip Purpose Summers 1985, 1986, 1989, 1993

Trip Purpose	← Without May Without Skagway¹ →				With May With Skagway
	1985	1986	1989	1993	1993
Vacation/Pleasure	272,600	356,200	331,200	510,300	594,200
Visiting Friends & Relatives	77,200	65,400	82,500	78,000	88,800
Business & Pleasure	36,800	31,600	46,000	44,700	55,800
Business Only	44,600	52,000	37,300	70,000	84,900
Seasonal Worker	17,600	8,600	15,200	10,100	13,200
Total Visitors	448,800	513,500	512,200	713,200	836,900

¹Data is presented for all four summer sampling periods which do not include May or Skagway for comparative purposes.

Entry/Intended Exit Transportation Mode

Domestic Air carried the largest number of visitors into Alaska, with more than half (53%) flying into the state during the summer. Cruise Ship followed bringing in nearly one-third (30%) of summer visitors. Highway, Ferry and International Air brought in the remainder (18%).

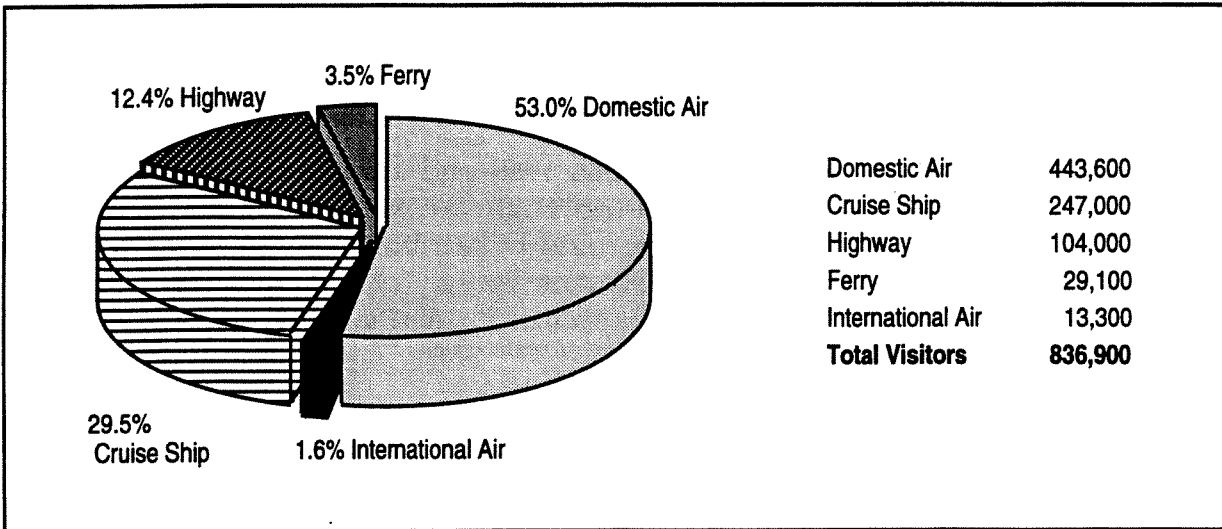
Entry figures shifted little between Summer 1989 and Summer 1993. Domestic Air maintained its dominance. Cruise arrivals increased to nearly one-third (30%) from 27%. Both Ferry and International Air arrivals dropped 1%. Highway entries maintained at 12% .

Intended exit for 1993 mirrored entry mode proportions with only slight variations. Again Domestic Air dominated the market with 55% intending to exit by this mode. Cruise visitors dropped slightly to 27% of all intended exit mode respondents. This decrease could be attributed to cruise visitors who sailed into Alaska and then opted to exit by Domestic Air. Highway exit mode numbers were slightly larger (13%) than those entering. Only 3% indicated they intended to leave Alaska by Ferry. International air users remained at the same level for both entry and exit.

The AVSP sample was designed by entry mode ensuring accurate entry mode data. Exit data, requested of each of the visitors interviewed prior to taking their trip through Alaska, reflects intention not actual behavior. Many visitors stayed for long periods of time and did not have set itineraries. Visitors most likely to not know their actual exit transportation mode were independent visitors using the Highway or state Ferry system. Also, many visitors were not entirely familiar with Alaska geography believing that they were leaving Alaska when they took a south bound ferry out of Haines, or believing they were flying out of Alaska when boarding a plane in Vancouver BC. While interview techniques minimized these faulty responses, minor differences between intended exit mode and actual exit information are expected. Actual exit selection will be available in *Patterns, Opinions and Planning*, document, the third of the Summer 1993 reports.

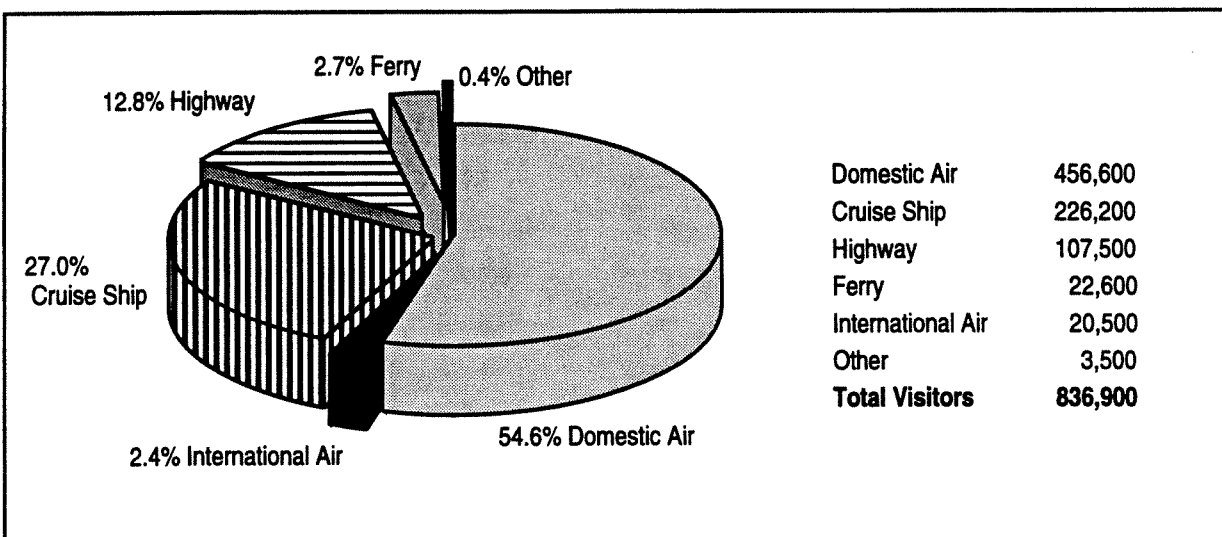
Graph II-B

Visitors by Entry Mode Summer 1993



Graph II-C

Visitors by Intended Exit Mode Summer 1993



Mode Use Patterns

Travelers to Alaska had several itinerary options that included using the same transportation mode to and from Alaska or using one mode to travel to Alaska and another to return home. Most visitors chose to travel round-trip utilizing the same mode in both directions. The bulk of those entering by Highway (89%) drove in and out of Alaska. Most Domestic Air and International Air visitor entries traveled round-trip with at least 80% of each entering and exiting by the same mode. Nearly 70% of those who arrived by Cruise Ship traveled round-trip. Less than half (40%) of those who arrived by Ferry returned by that mode.

Round-trip travel increased between 1989 and 1993 for Highway, Ferry and International Air visitors. Round-trip Highway users increased the most from 78% in 1989 to 89% in 1993. This could be attributed to the residual effects of promotional activities for the 50th Anniversary of the building of the Alaska Canada Highway. Domestic Air round-trip use diminished slightly and Cruise Ship use stayed the same.

Entry by one mode and exiting via another was practiced by some Alaska visitors. Ferry users were the most inclined to vary their itineraries with 38% entering by Ferry and exiting by Highway and 18% entering by Ferry and exiting by Domestic Air. Cruise visitors not traveling round-trip used Domestic Air to exit. Both Cruise and International Air entries who did not travel round-trip also were more likely to exit by Domestic Air.

Table II-F

Mode Use Patterns of All Visitors Summer 1993

Intended Exit Mode	Entry Mode					Total Visitors
	Domestic Air	Cruise Ship	Highway	Ferry	Int'l Air	
Domestic Air	83%*	32 %	3 %	18 %	14 %	55 %
Cruise Ship	13	68*	—	—	2	27
Highway ¹	1	<1	89*	38	2	13
Ferry	1	—	6	40*	1	3
International Air	2	<1	1	2	80*	2
Other	<1	—	—	—	—	<1
Don't Know	<1	—	1	2	1	<1
Total	100 %	100 %	100 %	100 %	100 %	100 %

*These percentages represent visitors who used this transportation mode to and from Alaska or round-trip.

¹Highway mode includes personal vehicles only. Not included are motorcoach and trucks.

Market Size by Mode Use

The total market size for a mode combines round-trip visitors and visitors who used the mode for one leg of the journey. As in previous years, Domestic Air dominated all other modes claiming nearly two-thirds of the total market. In Summer 1993 163,900 visitors used Domestic Air on one leg of their trip and 368,100 used Domestic Air round-trip. Therefore, the total market size of Domestic Air mode was 532,000. Cruise Ship claimed one-third of the mode market or 306,200 total mode users with 139,200 using the mode to either exit or enter Alaska and 167,000 using Cruise to travel round-trip. The total size of the Highway market was nearly one-eighth for all visitors. Ferry and International Air mode market sizes were 40,100 and 23,200, respectively.

Most Domestic Air users traveled round-trip (69%). Cruise Ship use was more balanced with more than half traveling round-trip (54%) and just under half (45%) using a Cruise Ship in a single direction. More than three-quarters of the Highway market drove in and out of Alaska. Ferry use was the most unique with more visitors using the state Ferry for only one leg rather than round-trip.

The total mode market includes visitors who use a transportation mode round-trip and one-way mode users either entering or exiting the state.

Table II-G

Mode Market Size¹ For All Visitors – Summer 1993

Transportation Mode	One-Way Users	Round-Trip Users	Total Users	Total Users As % of Visitor Market
Domestic Air	163,900	368,100	532,000	64 %
Cruise Ship	139,200	167,000	306,200	37
Highway ²	26,900	92,300	119,200	14
Ferry	28,500	11,600	40,100	5
International Air	12,500	10,700	23,200	3
Other/Don't Know	3,400	—	—	—
Total Visitors	374,400³	649,700	836,900	100 %

¹The total number of visitors using each mode for entry and exit. For example: 163,900 visitors used Domestic Air one way for either exit or entry. In addition 368,100 visitors used Domestic Air for both entry and exit. Therefore, the total number of Domestic Air users is 532,000.

² Highway mode includes personal vehicles only. Not included are motorcoach and trucks.

³The total one-way users is half the number of one-way mode users. For example: 374,400 visitors used 748,800 one-way modes to enter and exit Alaska.

Vacation/Pleasure visitor travel patterns presented in the following table differed from those of all visitors. As in the case of all visitors, more visitors tended to travel round-trip rather than use a mode one-way. The Domestic Air mode market still remained the largest (52%), however, Cruise Ship visitors attained nearly the same market size (51%). VP Highway and Ferry visitor mode markets were 18% and 6% respectively. The International VP mode market was 3%.

The majority of Highway users (78%) intended to travel round-trip, 81,400 of 104,700. Domestic Air users totaled 311,900 with slightly over half using Domestic Air round-trip and 152,900 using air one-way. Over half of the Cruise Ship users intended to sail round-trip (164,800 or 55% of total Cruise users). Ferry use differed from the other modes. More than three-quarters of ferry VP users traveled one-way. The remainder (7,000) used the ferry round-trip. More than half of International Air mode users were also inclined to travel one-way to or from Alaska rather than round-trip.

Table II-H

**Mode Market Size¹
For Vacation/Pleasure Visitors
Summer 1993**

Transportation Mode	One-Way Users	Round-Trip Users	Total Users	Total Users As % of Visitor Market
Domestic Air	152,900	159,000	311,900	52 %
Cruise Ship	136,400	164,800	301,200	51
Highway ²	23,300	81,400	104,700	18
Ferry	26,100	7,000	33,100	6
International Air	8,800	7,400	16,200	3
Other/Don't Know	1,700	-	-	-
Total Visitors	349,200³	419,600	594,200	100 %

¹The total number of visitors using each mode for entry and exit. For example: 152,900 visitors used Domestic Air one way for either exit or entry. In addition 159,000 visitors used Domestic Air for both entry and exit. Therefore, the total number of Domestic Air users is 311,900.

²Highway mode includes personal vehicles only. Not included are motorcoach and trucks.

³The total one-way users is half the number of one-way mode users. For example: 349,200 visitors used 698,400 one-way modes to enter and exit Alaska.

Trip Purpose of Entry Mode Visitors

Each entry mode catered to a variety of trip purpose groups. Cruises catered almost exclusively to VP travelers. Nearly all (99%) visitors on cruise traveled for vacation/pleasure purposes, while the remainder traveled for Business and Pleasure. Other entry modes were utilized by all of the trip purpose groups.

Domestic Air carried the greatest assortment of visitors. More than half traveled for Vacation and Pleasure. The remaining visitors on Domestic Air were primarily divided between VFRs and BOs.

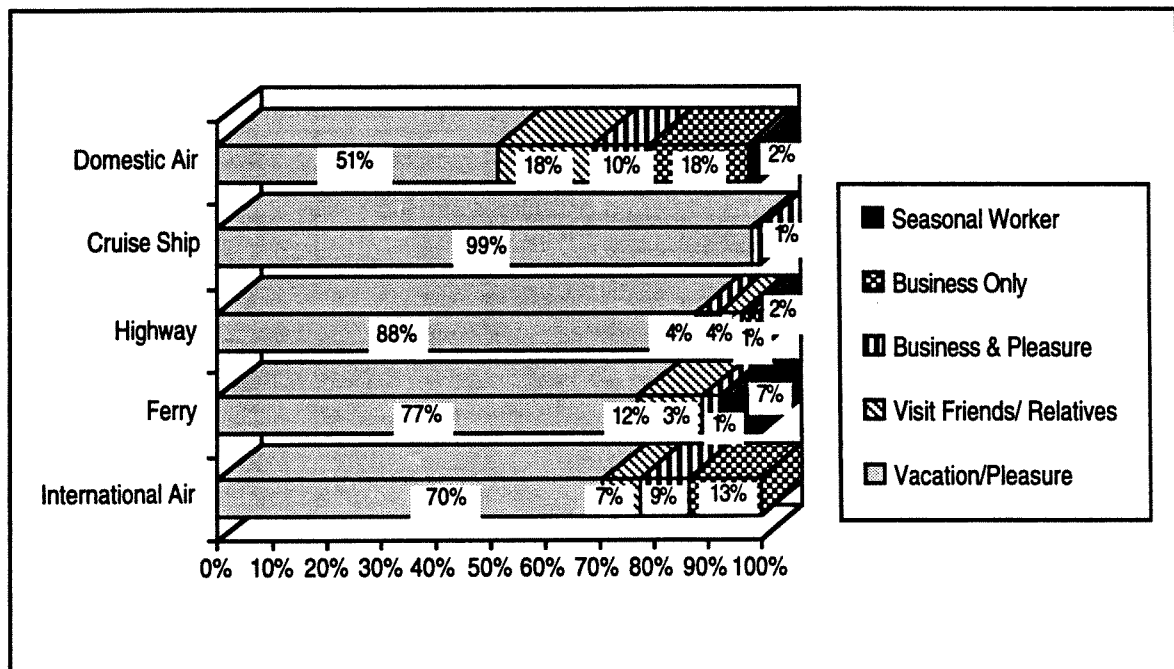
Highway entries were mostly made by VP visitors (88%). Equal numbers of VFR and BP visitors entered by highway (4% each). The remaining portion of Highway entries were made by BO and SW visitors.

The majority of Ferry visitors came for pleasure (77%). Ferry was also utilized by many VFRs (12%). Business travelers were less inclined to use the Ferry to enter Alaska, with only 3% of BOs and 1% of BPs entering by Ferry.

International Air carried a high portion of VPs to Alaska (70%). Business visitors made use of International Air to come to Alaska. Nearly one-quarter, including BOs and BPs, used International Air to enter the state. The remainder were VFR visitors.

Graph II-D

**Trip Purpose of Entry Mode Visitors
Percent of Sampled Visitors
Summer 1993**



Entry Modes of Trip Purpose Visitors

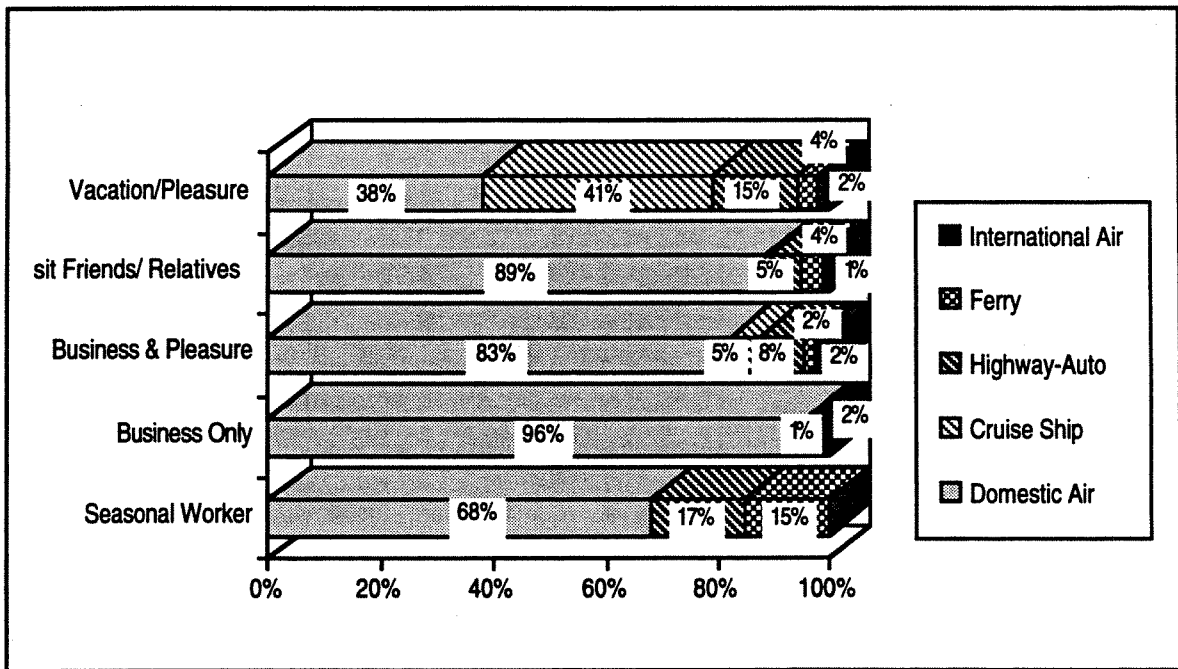
Among all trip purpose groups, VP visitors used the greatest assortment of entry modes. VP entries on Domestic Air and Cruise Ship were nearly evenly balanced (38% and 41% respectively). VP Highway entries were 15% during Summer 1993. A small percentage of VP visitors entered the state on the Ferry or at the International Airport in Anchorage.

Business Only (BO) visitors were the least likely to use a variety of transportation modes. They traveled almost exclusively (96%) on Domestic Air. The few remaining BOs arrived by Highway or International Air.

The remaining trip purpose groups (VFR, BP and SW) were most likely to travel by Domestic Air. VFRs and BPs used Domestic Air more heavily than SWs (89% and 83% versus 68%) However, SWs were much more likely to travel by Highway (17%) and Ferry (15%).

Graph II-E

Entry Modes of Trip Purpose Visitors
Percent of Sampled Visitors
Summer 1993



Entry Mode Trends

Since the AVSP's inception in 1985, all entry modes have experienced market growth. Even with ups and downs, the Cruise industry growth rate rose the most dramatically. Overall Cruise grew 56% with most growth occurring between 1989 and 1993 (53%). Increased capacity among existing operators combined with the addition of new operators and heavy promotion of cruises contributed to its expansion.

Domestic Air arrivals have also increased steadily since AVSP data was first collected. Total Domestic Air growth was 63% between 1985 and 1993. Domestic Air grew two times faster between 1989 and 1993 (9% annual growth rate) than between 1985 and 1989 (4%). Charter traffic, new carriers, and an increase in old carrier capacities into Anchorage and Fairbanks have all contributed to Domestic Air's rising numbers.

Total Highway growth since 1985 was 35%. As in the case of Cruise and Domestic Air most growth took place between 1989 and 1993. Highway entries grew at an annual average growth rate of nearly 9% between 1989 and 1993. Much of the expanded market can be attributed to promotional activities surrounding the 50th Anniversary of the building of the Alaska Canada Highway.

Ferry travel grew a total of 29% between 1985 and 1993. This is considerable growth since Ferry capacity has not changed over the years. The potential addition of a new vessel to the fleet could increase the Ferry system's ability to accommodate larger visitor numbers.

Although International Air experienced sizable increases between 1985 and 1989, it has lost ground, declining at an average annual rate of 2% since 1989. Changes in international flight patterns contributed to lower arrival numbers. Since air space has opened over Russia, fewer passenger planes require a fueling stop as a part of their flight plan. Also, innovations in plane engines have created greater fuel efficiency on the larger sized jets that are used for most international flights, resulting in fewer stops to refuel.

Table II-I

Visitor Trends by Entry Mode Summers, 1985, 1986, 1989 and 1993

Entry Mode	← Without May Without Skagway ¹ →				With May With Skagway
	1985	1986	1989	1993	1993
Domestic Air	240,700	256,700	283,400	392,100	443,600
Cruise Ship	139,800	163,400	142,100	217,500	247,000
Highway ²	46,800	54,300	45,200	63,300	104,000
Ferry	21,500	24,600	25,100	27,800	29,100
International Air	N/A	10,700	16,400	12,500	13,300
Total Visitors	448,800	513,500³	512,200	713,200	836,900

¹Data is presented for all four sampling periods which do not include May or Skagway for comparative purposes.
²Highway mode includes personal vehicles only. Not included are motorcoach and trucks.
³Total includes highway motorcoach entries sampled only in 1986.

Overall, entry mode use patterns have remained consistent over the years with only minimal shifts. The most significant change occurred among VP visitors' use of Domestic Air and Cruise Ship. Cruise itineraries changed with many more visitors using a Domestic Air component as a part of their trip. Entry mode trends of all visitors versus VP visitors are presented in the following table.

Table II-J

**Entry Mode Trends of All Visitors
and Vacation/Pleasure Visitors
Summer, 1985, 1986, 1989 and 1993**

Entry Mode	← Without May Without Skagway ¹ →								With May With Skagway	
	1985		1986		1989		1993		1993	
	All	V/P	All	V/P	All	V/P	All	V/P	All	V/P
Domestic Air	54 %	31 %	50 %	35 %	55 %	38 %	55 %	41 %	53 %	38 %
Cruise Ship	31	49	32	45	28	41	31	42	29	41
Highway ²	10	13	11	11	9	11	9	11	12	15
Ferry	5	7	5	6	5	6	4	4	4	4
International Air	N/A	N/A	2	2	3	3	2	2	2	2
Total Visitors	100 %	100 %	100 %	100 %	100 %	100 %	100 %	100 %	100 %	100 %

¹Data is presented for all four sampling periods which do not include May or Skagway for comparative purposes.
²Highway mode includes personal vehicles only. Not included are motorcoach and trucks.

Intended Travel Type

Independent travelers were the largest travel type group among all visitors to Alaska in Summer 1993. The total Independent market (57%) included visitors who were completely on their own (44%) and visitors who intended to purchase sightseeing trips while in Alaska (Inde-package visitors) (13%). Package visitors on the other hand comprised less than half (44%) of all visitors.

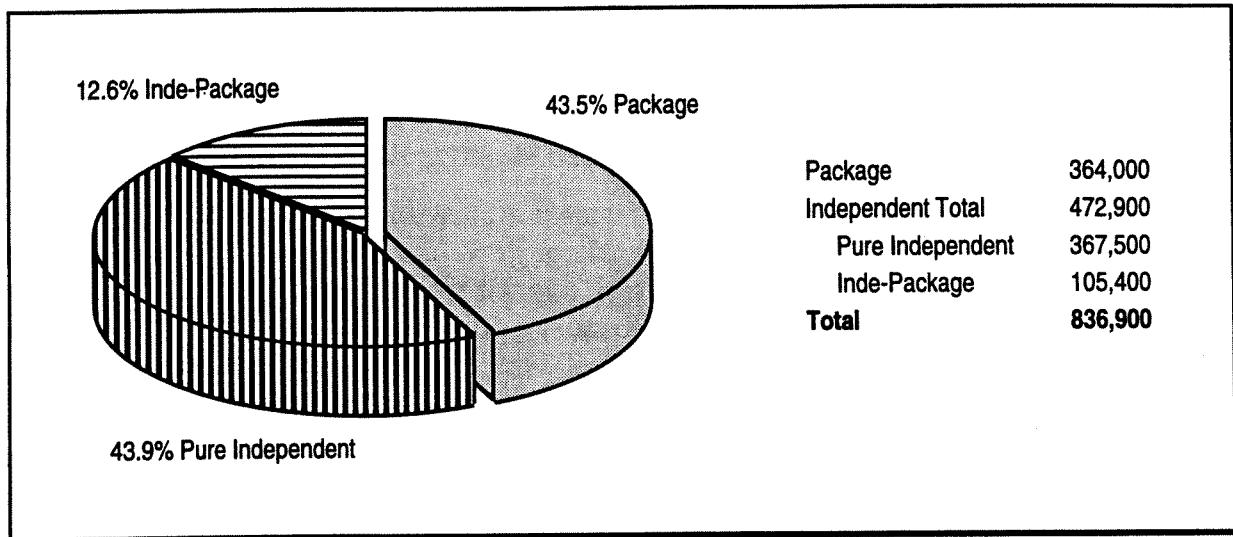
VP travel type proportions differ from all visitor proportions. Most VP visitors (58%), unlike the average visitor, traveled on a packaged trip. Many VP visitors included a cruise in some part of their Alaska itinerary contributing to the total VP Package market. All cruise travel is considered as package travel since all meals, lodging and travel are prepaid and included in one price.

The three travel types discussed above define three distinctive types of visitors. Each travel type requires a different marketing approach to reach them effectively. Package visitors prepaid all or most of the components of their trip prior to visiting Alaska through either a travel agent or a tour company. The best methods of marketing to package visitors is through travel agents and tour companies.

Pure Independent visitors devised their own itineraries independently or through a travel agent. Inde-package visitors fell into the Independent category because they also devised their own itineraries. However, Inde-package visitors intended to purchase sightseeing day tours or packages, such as flightseeing, or salmon bakes once they arrived in Alaska. Marketing to Pure Independent visitors could be targeted through travel agents as well as travel magazines. Inde-package visitors could also be reached once they arrived in Alaska.

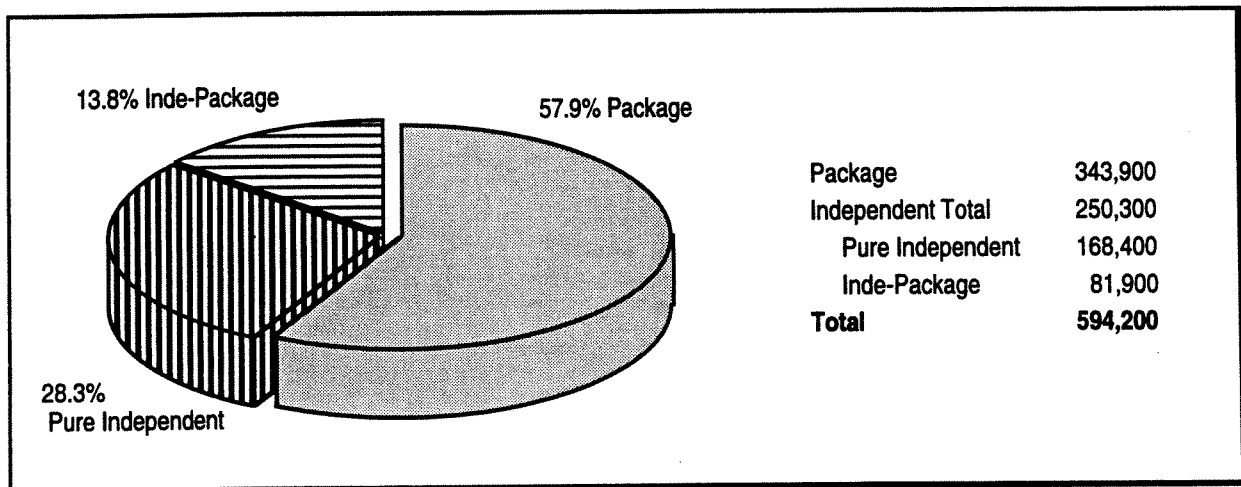
Graph II-F

**Intended Travel Type
All Visitors
Summer 1993**



Graph I-G

**Intended Travel Type
Vacation/Pleasure Visitors
Summer 1993**



Intended Travel Type Market Trends

Overall package visitors increased their market share growing a notable 76% for all visitors. Package visitors also grew considerably between 1989 and 1993. For this period all Package visitors grew at the significant annual average rate of 11%.

Total growth for the entire Independent visitor market, including Inde-package and Pure Independent visitors, was 47% between 1985 and 1993. Additionally, the total Independent visitor market grew at a significant annual average rate of nearly 11% between 1989 and 1993.

Travel type proportions between Package and Independent visitors were similar to those of previous years with the total Independent market (57%) outnumbering the Package market for all visitors. Some minor shifts occurred between Independents and Inde-package visitors between 1989 and 1993. Independents increased 3% and Inde-package visitors decreased 6% between 1989 and 1993. The Package market rose 3% since 1989.

Vacation/Pleasure visitors grew faster than any other trip purpose group. Both the Package and Independent markets grew considerably between 1985 and 1993. Package visitors experienced overall growth of 82% and Independent visitors doubled (99%). Similar to all visitors, the VP Package visitor market gained the most momentum between 1989 and 1993, experiencing an average annual growth rate of 12% while Independents averaged a 10% annual increase.

Package visitors claimed the greatest proportion of VP visitors (58%). A trend in larger vessels with additional capacity contributed to the rise of the VP Package market. VP Independent visitor proportions also shifted. Independent visitors increased while the Inde-package share decreased.

Visitors were asked their travel type at the beginning of their trip. Therefore, these results state intended versus actual behavior. While most visitors will travel as intended, some may not, particularly Independents who may not intend to purchase sightseeing, but actually do sometime during their trip. The *Visitor Opinion Survey*, the third survey in the AVSP series, will capture actual travel behavior.

Table II-K

Trend in Market Size of Intended Travel Types
All Visitors
Summers 1985, 1986, 1989 and 1993

Travel Type	← Without May Without Skagway ¹ →				With May With Skagway
	1985	1986	1989	1993	1993
Package	186,000	202,800	215,400	327,500	364,000
Total Independent	262,800	310,700	296,800	385,700	472,900
Independent	251,600	277,800	201,400	301,600	367,500
Inde-Package ²	8,700	32,900	95,400	84,100	105,400
Total Visitors	448,800	513,500	512,200	713,200	836,900
Average Annual Growth Rate	Between 1985-1989		Between 1989-1993		
Package	8.4 %		10.9 %		
Total Independent	5.6 %		10.6 %		
Total Visitors	6.8 %		8.6 %		

¹Data is presented for all four summer sampling periods which do not include May or Skagway for comparative purposes.
²Inde-package visitors are Independent visitors who plan to purchase in-state sightseeing tours during their Alaska trip.

Table II-L

Trend in Market Size of Intended Travel Types
Vacation/Pleasure Visitors
Summers 1985, 1986, 1989 and 1993

Travel Type	← Without May Without Skagway ¹ →				With May With Skagway
	1985	1986	1989	1993	1993
Package	170,400	195,900	193,700	309,600	343,900
Total Independent	100,900	160,300	137,500	200,800	250,300
Independent	93,500	135,400	78,700	137,300	168,400
Inde-Package ²	8,700	24,900	58,800	63,500	81,900
Total Visitors	272,600	356,200	331,200	510,400	594,200
Average Annual Growth Rate	Between 1985-1989		Between 1989-1993		
Package	8.9 %		12.4 %		
Total Independent	10.3 %		10.0 %		
Total Visitors	9.4 %		11.4 %		

¹Data is presented for all four sampling periods which do not include May or Skagway for comparative purposes.
²Inde-package visitors are Independent visitors who plan to purchase in-state sightseeing tours during their Alaska trip.

Intended Length of Stay

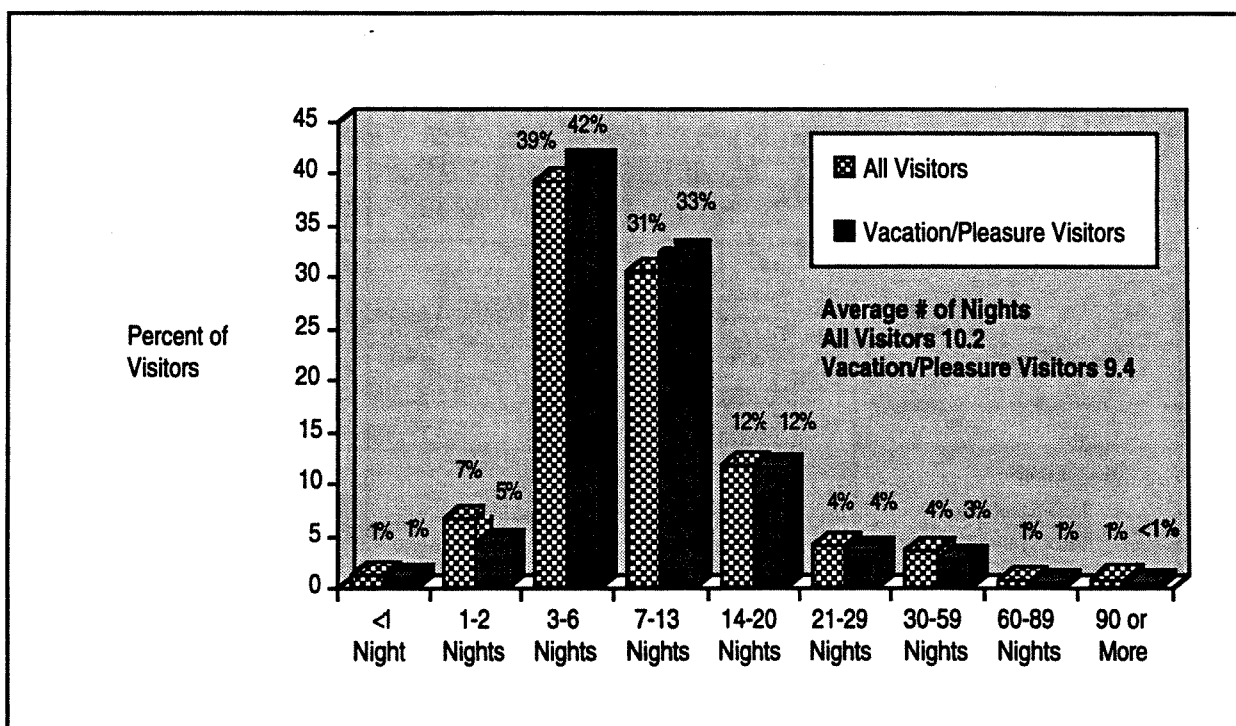
All visitors spent on average 10.2 nights in Alaska during their summer trip. The length of stay was shorter than in 1989, when visitors stayed on average almost 11 nights. Alaska length of stay numbers were consistent with national trends in which travelers took shorter, more frequent trips throughout the year.

Average length of stay varied according to trip purpose. VFRs stayed the longest period of time averaging 15 nights. BP visitors stayed the second longest averaging 12.5 nights. VP visitors and BO visitors averaged about the same amount of time in Alaska (9.4 and 9.3).

The greatest portion of all visitors (42%) stayed between three and six nights as did most (39%) VP visitors. Length of stay between seven and thirteen nights was popular for one-third of all visitors and VPs.

Graph II-H

Intended Length of Stay All Visitors and Vacation/Pleasure Visitors Summer 1993



Length of Stay Trends

Visitor length of stay in Alaska has declined over the past eight years. All visitors stayed on average nearly two weeks in Alaska in 1985. By 1993, the length of stay had shortened to just over ten days. Travel trends point toward visitors taking a number of short vacations during a year rather than taking a single lengthy one.

VP length of stay followed a similar pattern as all visitors, though the drop in length of stay was less dramatic. VPs' intended to stay nine days in 1993, one day less than in 1985.

Table II-M

**Length of Stay Trends
All Visitors and Vacation/Pleasure Visitors
Average Number of Nights
Summers 1985, 1986, 1989 and 1993**

	← Without May Without Skagway¹ →				With May With Skagway
	1985	1986	1989	1993	1993
All Visitors	12.7	11.4	11.0	10.2	10.2
Vacation/Pleasure Visitors	10.4	10.0	9.5	9.4	9.4

¹Data is presented for all four summer sampling periods which do not include May or Skagway for comparative purposes.

Visitor Characteristics

Repeat Visits to Alaska

VFRs were the most motivated to return to Alaska and half (48%) had been to the state within the last five years for this purpose. Nearly one-third (28%) of Summer 1993 VFRs had made two trips, on average, to Alaska in the last five years.

BP visitors also returned to Alaska frequently with one-quarter having made repeat visits within the last five years. Many BP visitors made between one or two visits. Equal numbers (4%) of BP visitors also returned 3-4 times, 5-6 times or made more than nine visits.

Repeat visits to Alaska were made by one-fifth of VP visitors. As in other trip purpose groups, VPs were more likely to return to Alaska one to two times within the last five years.

Business travelers including BOs and SWs were the least inclined to return to Alaska (16% and 14% respectively).

Of those who visited Alaska within the last five years, the average repeat visit rate varied little among the trip purpose groups. Only SWs had a lower average repeat rate with only 14% of all SWs returning to work in Alaska.

Table II-N

Repeat Visit Rate By Trip Purpose Percent Visiting for Pleasure in Last Five Years Summer 1993

Number of Visits	Vacation/ Pleasure	Visiting Friends and Relatives	Business/ Pleasure	Business Only	Seasonal Worker
1 - 2 Visits	12 %	28 %	13 %	9 %	12 %
3 - 4 Visits	3	9	4	2	1
5 - 6 Visits	2	7	4	1	2
7 - 8 Visits	<1	<1	1	1	-
9 or More Visits	2	5	4	3	-
No Repeat Visits	80 %	52 %	75 %	84 %	86 %
Average Repeat Visit Rate	1	2	2	1	<1

Repeat Visits to Alaska Trends

Repeat visit rates overall have grown only slightly. Business visitor repeat rates have remained the same over the years, while the repeat rate for pleasure visitors has grown only a small amount since Summer 1985. In fact, the repeat rate for all pleasure visitors combined (VFR and VP) has dropped in the past four years.

Table II-O

Repeat Visit Rate Trends for Pleasure and Business Visitors All Visitors and Vacation/Pleasure Visitors Percent Visiting in Last Five Years Summers 1985, 1986, 1989 and 1993

	← Without May Without Skagway ¹ →				With May With Skagway
	1985	1986	1989	1993	1993
For Pleasure					
All Visitors	16 %	20 %	24 %	21 %	23 %
Vacation/Pleasure Visitors	13	16	17	18	20
For Business					
All Visitors	14 %	15 %	13 %	13 %	14 %

¹Data is presented for all four summer sampling periods which do not include May or Skagway for comparative purposes.

Visitor Origin

Alaska's travelers largely hailed from the United States. Overall, the West brought the largest number of visitors from the United States – more than one-third (37%) of Alaska's summer visitors. Among Western visitors, California visitors numbered 117,000 or 14% of all visitors to Alaska. Washingtonians accounted for the next largest portion (10%).

The southern states brought the second largest group of U.S. travelers to Alaska (21%). Most southern visitors came from either Florida or Texas. The Midwest and East brought the remainder of U.S. visitors (15% and 11% respectively).

Canada accounted for 10% of all visitors to Alaska in Summer 1993. British Columbia and Yukon Territory were the largest of the Canadian markets for Alaska. The proximity of these provinces contributes to frequent travel into the state by Canadians.

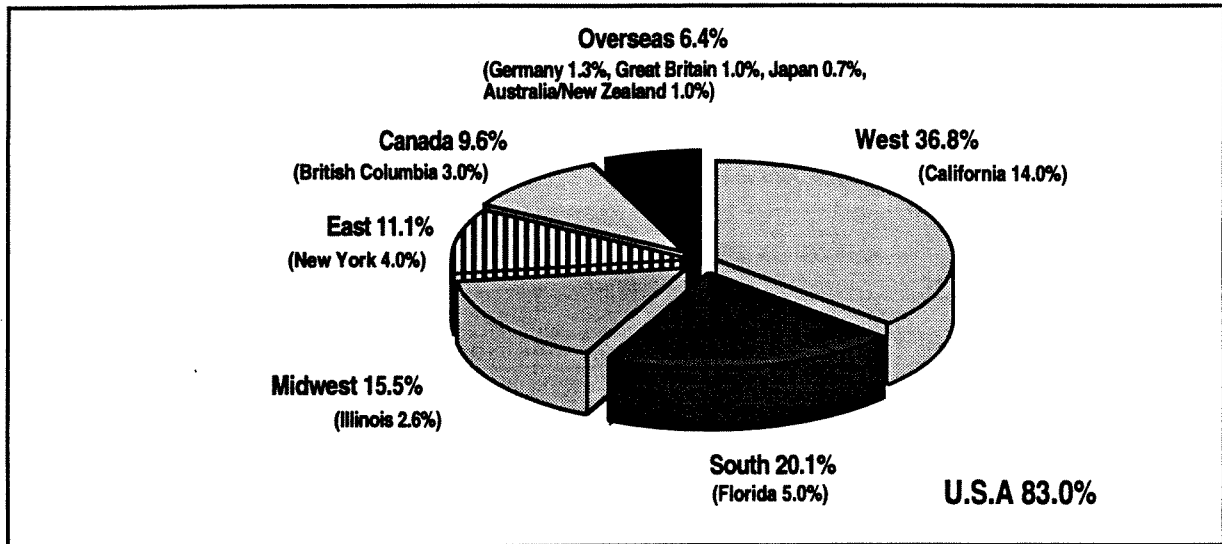
Overseas visitors to Alaska numbered around 53,000 or 6% of all visitors to the state. Europe accounted for the largest group from overseas. Most Europeans came from Germany, Switzerland, Austria or Great Britain.

Pacific region visitors comprised only 2% of the total summer sample. The largest group from this region was from Australia and New Zealand. Japanese visitors comprised nearly 1% of all visitors to Alaska with most coming to Alaska on charter flights late in the summer.

VP visitor origin proportions were similar to that of all visitors. United States VPs dominated with the Western states being the largest portion. The Midwest market share was slightly larger among VPs. Both VP Canadian and Overseas proportions were 2% higher than all visitor proportions for Canada and Overseas.

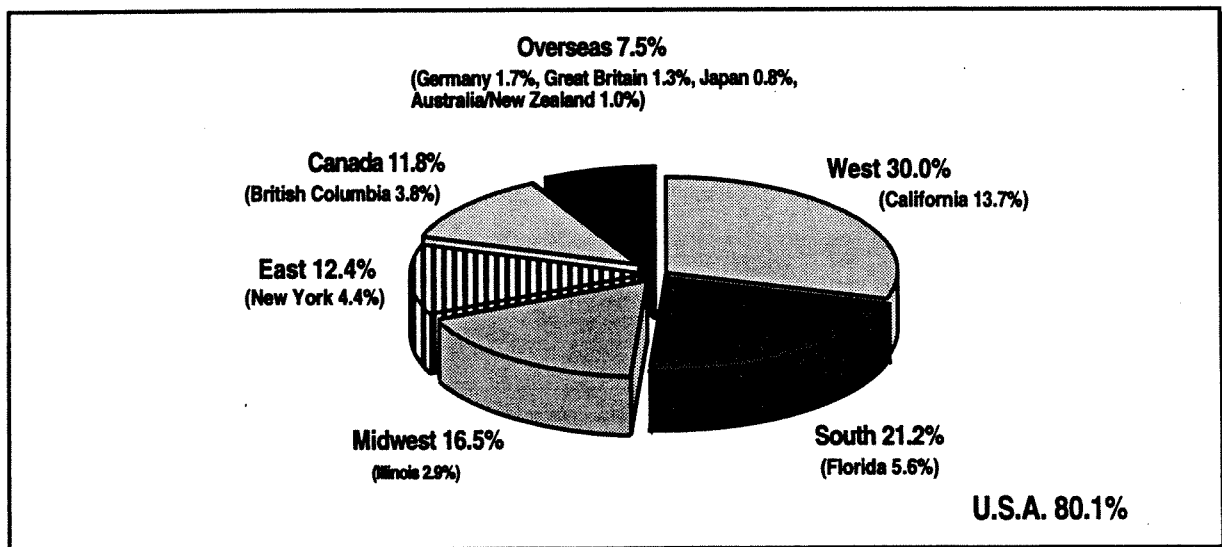
Graph II-I

**Visitor Origin
All Visitors
Summer 1993**



Graph II-J

**Visitor Origin
Vacation/Pleasure Visitors
Summer 1993**



Visitor Origin Trends

Visitors from all origin points have grown considerably in the past eight summer seasons. However, the proportion of visitors from various origin points has gradually shifted.

Though the United States has been the dominant source for Alaska visitors, it has lost some of its market share to Canada and Overseas countries. Since 1985, the U.S. market dropped nearly 10 points while Canada and the Overseas visitor market shares increased three and five points respectively.

The market shares among U.S. regions also shifted. The West has gradually given up some of its share to the South and the East. The Midwest visitor market dropped in 1986 and 1989 and rose slightly in 1993.

More detailed origin tables appear on the following pages.

Table II-P

Visitor Origin Trends Percent of Sampled Visitors Summers 1985, 1986, 1989 and 1993

Origin	← Without May Without Skagway ¹ →				With May With Skagway
	1985	1986	1989	1993	1993
United States	94 %	93 %	88 %	85 %	83 %
West	50	48	43	37	37
California	19	21	17	14	14
Washington	13	14	12	11	10
Midwest	18	18	15	16	15
South	18	17	19	21	20
East	9	9	10	12	11
Canada	4	4	6	7	10
Overseas	2	3	6	7	6
Europe	N/A	2	4	4	4
Pacific	N/A	1	2	2	2
Total	100 %	100 %	100 %	100 %	100 %

¹Data is presented for all four summer sampling periods which do not include May or Skagway for comparative purposes.

Table II-Q

Visitor Arrivals by Place of Origin of Sampled Visitors Summers 1993

	Total Visitors	Percent of Total Visitors
West	307,600	36.8 %
California	117,200	14.0 %
Washington	87,200	10.4
Oregon	29,400	3.5
Colorado	19,500	2.3
Arizona	14,000	1.7
Hawaii	8,300	1.0
Montana	8,100	1.0
Utah	7,200	0.9
Idaho	7,000	0.8
New Mexico	5,200	0.6
Nevada	3,300	0.4
Wyoming	1,300	0.2
South	168,000	20.1%
Florida	41,600	5.0 %
Texas	38,400	4.6
Virginia	12,500	1.5
Georgia	12,100	1.4
North Carolina	9,900	1.2
Maryland	8,300	1.0
Louisiana	8,100	1.0
Tennessee	7,600	0.9
Alabama	7,000	0.8
Oklahoma	5,500	0.7
Arkansas	4,200	0.5
Kentucky	3,600	0.4
South Carolina	2,700	0.3
West Virginia	2,300	0.3
Delaware	1,500	0.2
Mississippi	1,500	0.2
District of Columbia	1,200	0.1
Midwest	126,300	15.1 %
Illinois	21,400	2.6 %
Ohio	21,200	2.5
Michigan	19,000	2.3
Minnesota	18,600	2.2
Missouri	10,900	1.3
Wisconsin	9,400	1.1
Indiana	9,100	1.1
Iowa	7,200	0.9
Kansas	3,900	0.5
Nebraska	3,300	0.4
South Dakota	1,700	0.2
North Dakota	800	0.1

Table II-Q continued

	Total Visitors	Percent of Total Visitors
East	92,900	11.1 %
New York	33,300	4.0 %
Pennsylvania	18,600	2.2
New Jersey	18,200	2.2
Massachusetts	10,000	1.2
Connecticut	6,200	0.7
Maine	2,500	0.3
New Hampshire	1,900	0.2
Rhode Island	1,500	0.2
Vermont	900	0.1
Total United States	694,900	83.0 %
Canada	80,700	9.6 %
British Columbia	25,400	3.0 %
Yukon	19,100	2.3
Alberta	12,900	1.5
Ontario	12,100	1.4
Saskatchewan	3,600	0.4
Quebec	2,600	0.3
Manitoba	2,500	0.3
Nova Scotia	1,300	0.2
Overseas	53,300	6.4 %
Europe	30,400	3.6 %
Germany	10,500	1.3
Great Britain	8,500	1.0
Switzerland	5,400	0.6
Russia	2,100	0.3
Sweden	1,100	0.1
Other Europe	5,000	0.5
Pacific Region Total	16,900	2.0 %
Australia/New Zealand	8,000	1.0
Japan	6,000	0.7
Other Pacific Region	2,900	0.3
Other Overseas	4,100	0.5 %
Mexico	1,900	0.2
Other Overseas	2,100	0.2
Unknown	8,000	1.0 %
Total Visitor Arrivals	836,900	100.0 %

Party Size

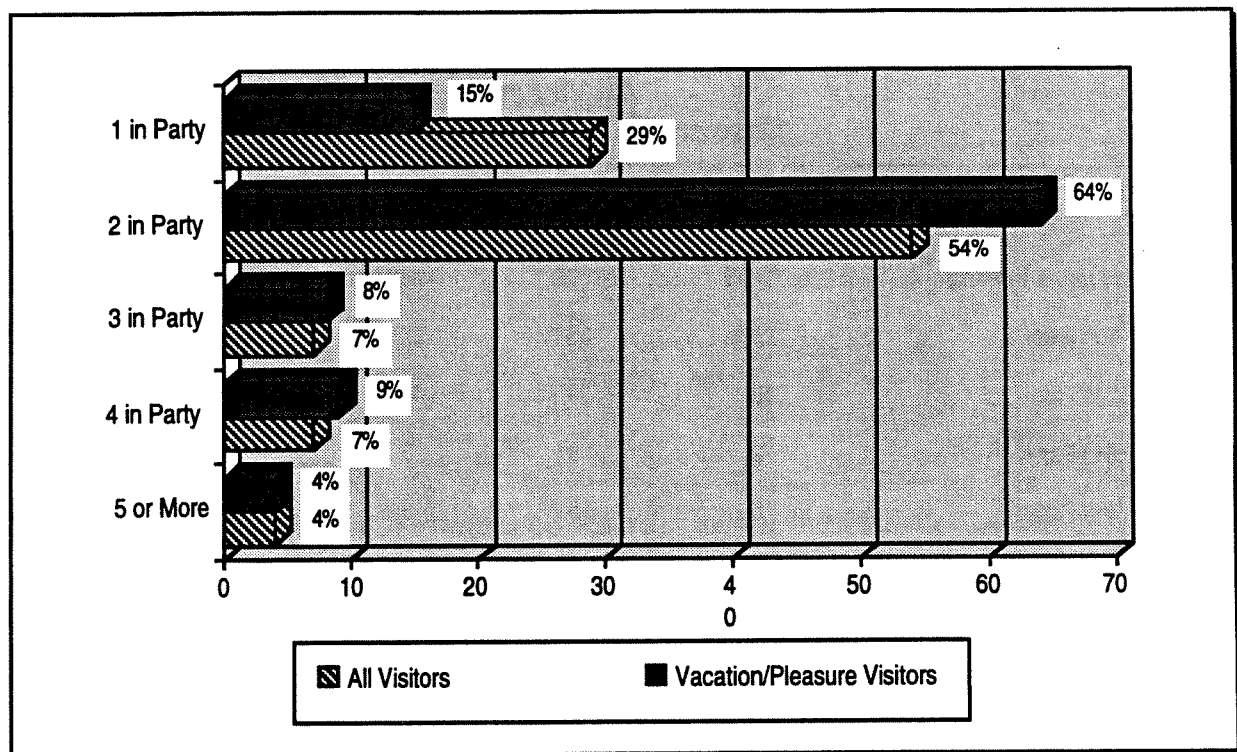
Most parties traveling together to Alaska, sharing expenses such as food, lodging or local transportation comprised at least two people. More than half of all visitor parties contained two travelers. However, some visitors (15%) traveled to Alaska unaccompanied. The remainder primarily traveled with three or four in their party.

VP visitors were more likely to travel in pairs with nearly two-thirds indicating there were two in their party in Summer 1993. A sizable portion of VPs (29%) also elected to travel without a companion.

The mean party size for all visitors was 2.1, only slightly less than the average party size of VPs (2.2). Party sizes of ten or more were eliminated to prevent skewing the data.

Graph II-K

Visitor Party Size
All Visitors and Vacation/Pleasure Visitors
Summer 1993



Party Size Trends

As reflected on the following table, visitor party size has not altered significantly over the years. The average party size has fluctuated between a high of 2.4 in 1989 to a low of 1.9 in 1986. The average party size dropped to 2.1 in 1993, evidence of more visitors traveling in parties of one or two and less visitors traveling in parties of three or more people.

An average party size of two has been the most common party size for half of all visitors during the past eight years. The number of visitors traveling alone has gradually risen since 1985. Single visitor party size increased to nearly 30% of all visitors, up from one-quarter in 1985. A significant increase of single visitors occurred in 1986, which was a very high volume year for visitors to Alaska due to EXPO in Vancouver B.C.

Table II-R

Visitor Party Size Trends All Visitors Summers 1985, 1986, 1989 and 1993

Number in Party	← Without May Without Skagway¹ →				With May With Skagway
	1985	1986	1989	1993	1993
1 in Party	25 %	33 %	27 %	29 %	29 %
2 in Party	53	54	49	53	54
3 in Party	9	6	9	7	7
4 in Party	8	5	9	7	7
5 or More	5	2	6	2	2
Mean Party Size	2.2	1.9	2.4	2.1	2.1

¹Data is presented for all four summer sampling periods which do not include May or Skagway for comparative purposes.

Demographics

Visitor Age

Visitors to Alaska averaged 48 years of age in Summer 1993. Male visitors tended to be three years younger (46) than females (49). The average age of all Alaska visitors has fallen slightly over the years, from 50 in 1985 to 48 in 1993.

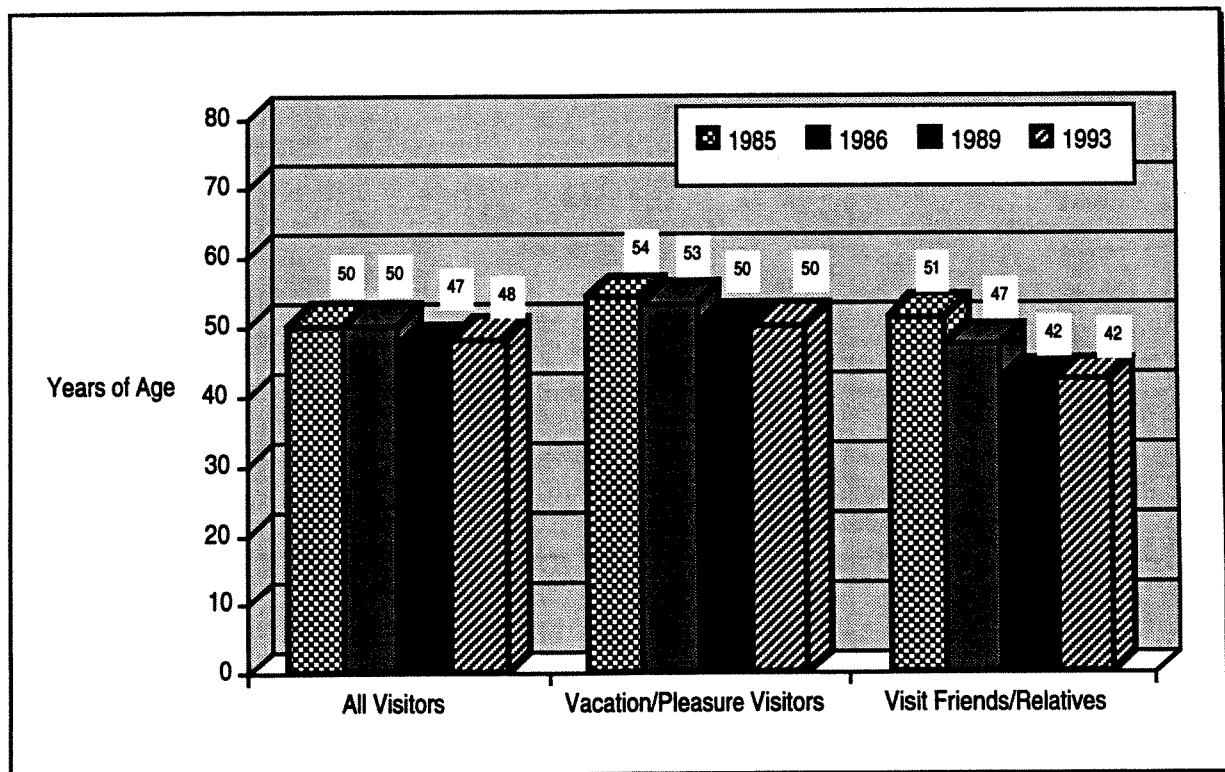
Vacation/Pleasure visitor age differed from that of all visitors. The average age of VPs was two years higher (50) than that of all visitors. Once again VP females tended to be older than males. VFR visitors were the youngest of the VP visitors averaging 42 years of age.

Similar to all visitors, VPs also experienced a drop in age becoming four years younger between 1985 and 1993. VFRs experienced the most significant decrease. Between 1985 and 1993 the average age of VFRs became nine years younger. VP visitor age also decreased four years between 1985 and 1989.

Following a significant drop of four years in average age between Summer 1985 and 1989, VP visitor age has remained steady. VFR age also dropped considerably between 1985 and 1989, but has not changed since then.

Graph II-L

Visitor Age Trends
All Visitors, Vacation/Pleasure and Visit Friends and Relatives Visitors
Summer 1993



Visitor Age Trends

The most significant trend regarding Alaska visitor age was its gradual decline. In Summer 1985, one-quarter of all visitors were between 55 to 64 years of age. By 1989, the 55-64 year old market size had decreased four points and the number of 45-54 year olds had increased.

There was continued growth in the younger age categories between 1989 and 1993. The 35-44 year old and the 45-54 year old age brackets both increased.

Younger markets signify a change in visitor activities. While older visitors are more likely to see Alaska through passive tour options such as sightseeing from tour busses, younger visitors tend to want more interactive experiences. Younger visitors would be more willing to experience Alaska first hand, participating in activities such as kayaking, canoeing and hiking.

Table II-S

Visitor Age Trends
All Visitors
Summers 1985, 1986, 1989 and 1993

Age	← Without May Without Skagway ¹ →				With May With Skagway
	1985	1986	1989	1993	1993
Average Age	50	50	47	48	48
<18	7 %	6 %	8 %	6 %	6 %
18-24	4	4	4	4	5
25-34	12	12	11	10	11
35-44	14	14	15	16	16
45-54	14	15	17	19	19
55-64	24	24	21	19	19
65-74	20	21	19	19	19
75 and over	5	4	5	6	6
Total Visitors	100 %	100 %	100 %	100 %	100 %

¹Data is presented for all four summer sampling periods which do not include May or Skagway for comparative purposes.

Visitor Gender

Overall, male visitors outnumbered female visitors to Alaska. More than half (53%) of visitors to Alaska were male. This trend has been virtually the same since data was first collected, with only minor variations in 1986 and 1993. In 1986, male visitors diminished slightly dropping two points and in 1993 increased slightly by one point.

Male visitors also dominated all but one entry mode to Alaska. Most Domestic Air (58%), International Air (59%), Highway (56%) and Ferry (51%) visitors were male. Only Cruise attracted more female (55%) than male visitors.

VPs were equally male and female differing slightly from all visitors, reflecting a change from previous years. In 1985 and 1986 VP female visitors outnumbered male visitors. In 1989 and 1993 the balance among VP genders became equal.

Table II-T

Visitor Gender Trends All Visitors and Vacation/Pleasure Visitors Summers 1985, 1986, 1989 and 1993

		← Without May Without Skagway ¹ →				With May With Skagway
		1985	1986	1989	1993	1993
All Visitors	Male	54 %	52 %	52 %	53 %	53 %
	Female	46	48	48	47	47
Vacation/Pleasure Visitors	Male	47 %	49 %	50 %	50 %	50 %
	Female	53	51	50	50	50

¹Data is presented for all four sampling periods which do not include May or Skagway for comparative purposes.

Visitor Employment Status

Over half of all visitors to Alaska were employed, while retired visitors comprised one-third of all visitors. Those who were either students, children, or not in the labor force (Other) were 12% of all summer visitors.

Overall, Alaska attracted fewer retired visitors than in previous years. At the same time, the number of employed visitors has increased slightly. Those visitors not in the labor force also grew in numbers.

VP visitor employment status reflected similar trends to visitors overall. Employed VPs now comprise half of the VP market, increasing from 45% in 1985. Retired VPs have declined from nearly half of the market in 1985 to just over one-third of the market in 1993. These trends reflect the younger visitor market in general.

Table II-U

Visitor Employment Status Trends All Visitors and Vacation/Pleasure Visitors Summers 1985, 1986, 1989 and 1993

		<-----Without May/Without Skagway ¹ ----->				With May With Skagway
		1985	1986	1989	1993	1993
All Visitors	Employed	53 %	51 %	52 %	55 %	56 %
	Retired	37	36	31	33	32
	Other	10	13	16	12	12
Vacation/Pleasure	Employed	45 %	46 %	47 %	50 %	50 %
	Retired	46	42	37	38	38
	Other	9	12	15	12	12

¹Data is presented for all four summer sampling periods which do not include May or Skagway for comparative purposes.

Table II-V

Summary Profile

All Visitors Combined Trends

	Without May Without Skagway ¹				With May With Skagway
	1985	1986	1989	1993	1993
Main Trip Purpose					
% Business Only	10	10	7	10	10
% Business & Pleasure	8	6	9	6	7
% Vacation/Pleasure	61	68	65	72	71
% Visiting Friends & Relatives	17	14	16	11	11
% Seasonal Worker	4	2	3	1	2
Entry Mode					
% Domestic Air	54	52	55	55	53
% International Air	-	2	3	2	2
% Cruise Ship	31	28	28	30	29
% Ferry	5	5	9	4	4
% Highway ²	10	12	5	9	12
Intended Exit Mode					
% Domestic Air	55	55	57	57	55
% International Air	1	2	3	3	2
% Cruise Ship	28	25	25	28	27
% Ferry	5	4	3	2	3
% Highway	9	12	11	10	13
Intended Travel Type					
% Package Tour	41	40	42	46	43
% Independent Total	60	59	58	54	57
% Pure Independent	54	56	39	42	44
% Inde-Package ³	6	3	19	12	13
Intended Stay⁴					
Average Number of Nights	13	11	11	10	10
% 0-6 Nights	33	40	39	46	47
% 7-20 Nights	54	47	47	44	42
% Over 20 Nights	13	12	14	10	10
Party Size⁵					
Average # of Persons	2.2	1.9	2.4	2.1	2.1
Repeat Visits (Last 5 Years)					
% Repeating for Pleasure	16	19	22	21	23
% Repeating for Business	14	15	11	13	14
% Repeating Total	28	31	32	32	33
Origin					
% West	50	48	43	37	37
% Midwest	18	18	15	16	15
% South	18	17	19	21	20
% East	9	9	10	12	11
% Canada	4	4	6	7	10
% Overseas	2	3	6	7	6
Average Age	50	50	47	48	48
Gender					
% Male	54	53	52	53	53
% Female	46	47	48	47	47
Employment Status					
% Employed	53	51	52	55	56
% Retired	37	36	31	33	32
% Other	13	9	16	12	12

¹Data is presented for all four summer sampling periods which do not include May or Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoach and trucks.

³Inde-Package visitors are Independent visitors who plan to purchase in-state sightseeing tours during their Alaska trip.

⁴Intended Stay is computed excluding seasonal workers.

⁵Party size is computed excluding parties of ten or more.



Chapter III: Trip Purpose Profiles

Vacation/Pleasure Visitors

General Overview

Vacation/Pleasure Visitors by Travel Type

Visiting Friends and Relatives

Business/Pleasure Visitors

Business Only Visitors

Seasonal Worker Visitors

Vacation/Pleasure Visitor Profile

Market Size: Vacation/Pleasure visitors (VPs) were the largest trip purpose group among all visitors. During Summer 1993, Vacation/Pleasure visitors comprised nearly three-quarters (71%) of the total visitor market.

Entry Mode and Intended Exit Mode: Overall mode use patterns were similar to previous sampled years. Vacation/Pleasure visitors used Domestic Air and Cruise Ship as their primary transportation modes to and from the state. Highway was the third most important entry and exit mode carrying one in ten visitors. Ferry and International Air were the least used among all the modes.

Intended Travel Type: Over half (58%) of all Vacation/Pleasure visitors traveled on a Package trip. Total Independents comprised 40% of all VPs. Two-thirds of Independents traveled completely on their own, while one-third planned to purchase sightseeing trips while in Alaska.

Intended Stay: Vacation/Pleasure visitors intended to spend approximately 9 nights (9.4) in the state, slightly less than the average visitor and fewer nights than any other trip purpose group with the exception of Business Only visitors. Among VPs, 42% intended to stay between 3-6 nights, while 33% planned to stay between 7-13 nights.

Party Size: The average party size for Vacation/Pleasure visitors was 2.2, down slightly from 2.4 in Summer 1989.

Repeat Visits: Overall, 20% of Vacation/Pleasure visitors took repeat trips to Alaska for either pleasure or business in the last five years. Two in ten VPs took a pleasure trip, while less than one in ten traveled on a business trip in the last five years. The VP repeat rate remains the lowest among all trip purpose groups.

Origin: Nine in ten Vacation/Pleasure visitors originated from the U.S and Canada. VPs from Overseas have doubled in the past four years and comprised nearly one in ten VP visitors. Most VPs originated from the West, however, the proportion of VPs from the West declined since Summer 1989, while the proportions from the South and East grew.

Demographics: Equal numbers of men and women were represented among Vacation/Pleasure visitors. The average age of Vacation/Pleasure visitors, which steadily declined until 1989, appeared to have stabilized at 50 during 1993. Over half of VPs were retired and one-third were employed.

***Chapter III:
Trip Purpose Profiles***

Table III-A

Vacation/Pleasure Visitor Profile

	← Without May Without Skagway ¹ →				With May With Skagway 1993
	1985	1986	1989	1993	
Market Size					
Vacation/Pleasure	61 %	68 %	66 %	72 %	71 %
Entry Mode					
Domestic Air	31 %	37 %	38 %	41 %	38 %
Cruise Ship	49	41	41	42	41
Highway ²	13	13	11	11	15
Ferry	7	6	6	4	4
International Air	n/a	2	3	2	2
Intended Exit Mode					
Domestic Air	36 %	42 %	42 %	44 %	41 %
Cruise Ship	45	37	37	39	38
Highway	11	13	14	13	16
Ferry	7	5	3	2	3
International Air	n/a	2	3	3	2
Intended Travel Type					
Package	63 %	55 %	59 %	61 %	58 %
Independent Total	37	45	42	39	42
Pure Independent	34	38	24	27	28
Inde-Package ³	3	7	18	12	14
Intended Stay - Average # Nights⁴	10	10	10	9	9
0 Nights	0 %	3 %	0 %	—	1 %
1-2	5	5	2	2	5
3-6	30	33	41	44	42
7-13	42	36	36	34	33
14-20	14	12	13	12	12
21+	9	11	8	7	8
Party Size - Average⁵	2.4	2.0	2.4	2.3	2.2
Origin					
West	42 %	51 %	36 %	30 %	30 %
California	21	16	18	14	14
Washington	6	22	6	6	6
Midwest	21	13	17	17	17
South	19	17	19	23	21
East	10	11	11	13	12
Canada	5	4	8	9	12
Overseas	3	4	7	8	8
Age - Average	54	53	50	50	50

¹Data is presented for all four summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are Motorcoach and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

Vacation/Pleasure Visitors by Travel Type

Overview: A comparison of Vacation/Pleasure visitors by travel type provides a clearer understanding of the composition of VPs. The three travel types, Package, Independent, and Inde-Package are each unique in their characteristics. Package visitors primarily used two modes of entry and intended exit, stayed a shorter period of time than their Independent counterparts and were older. Independent and Inde-Package visitors were both Independent visitors. However, the Inde-Package visitor planned to purchase sightseeing trips, such as day tours, once in the state. Both have much in common with one another, though some notable differences were present, particularly in repeat visitation, age and origin. The following analysis compares the three groups.

Market Size: Over half of Vacation/Pleasure visitors traveled on a Package trip (58%), representing 343,900 of all VPs during Summer 1993. Four in ten (42%) or 250,300 Vacation/Pleasure visitors were Independent travelers. One in ten (14%) or 81,900 VPs planned to purchase sightseeing trips while in Alaska.

Entry and Intended Exit Mode: Cruise Ship was the primary transportation mode for nearly seven in ten Package Vacation/Pleasure visitors. Domestic Air was the second most used transportation mode among Package VPs, with nearly three in ten (28%) entering the state by Domestic Air, and slightly more than one-third (35%) leaving Alaska via a Domestic carrier. Very few Package VPs used Highway, Ferry or International Air for travel to and from Alaska.

Domestic Air was the primary transportation mode for Independent Vacation/Pleasure visitors. Highway was second. Independent travelers were less likely than Package trip VPs to travel by Cruise Ship, and more likely than other travel type groups to travel by International Air and Ferry.

Inde-Package visitors primarily used the Highway for travel to and from Alaska, using Domestic Air secondarily. Inde-Package VPs were the most likely to use the Ferry and the least likely to use International Air for travel to and from Alaska.

Intended Stay: Package visitors spent an average of 6.7 nights in the state, about half as long as Independent visitors at 11.8 nights. Inde-Package visitors stayed the longest, spending an average of 15.8 nights.

Party Size: Party size was similar among all VP travel types. Package and Independent VPs traveled in an average party size of 2.2 people, while Inde-Package visitors traveled in slightly larger parties (2.3). Independent travelers were the most likely to travel as individuals (23%), while Package VPs were the most likely to travel in pairs (71%).

Repeat Visits: Independent Vacation/Pleasure visitors were the most experienced Alaska travelers, with (39%) visiting for business and/or pleasure within the last five years, virtually always for pleasure (39%). One-quarter (26%) of Inde-Package VPs have been to Alaska within the last five years, also primarily for pleasure. (24%). Package visitors have the least Alaska travel experience, with 11% having traveled to Alaska in the last five years.

Table III-B

**Vacation/Pleasure Visitors
by Travel Type
Summer 1993**

	Package	Pure Independent	Inde-Package ¹
Market Size			
Vacation/Pleasure Visitors	58	28	14
All Visitors	44 %	44 %	13 %
Entry Mode			
Domestic Air	28 %	60 %	38 %
Cruise Ship	70	1	<1
Highway ²	<1	33	43
Ferry	<1	3	18
International Air	1	3	<1
Exit Mode			
Domestic Air	35 %	54 %	39 %
Cruise Ship	61	6	2
Highway	<1	31	48
Ferry	<1	4	10
International Air	2	4	1
Intended Stay³			
Average # of Nights	6.7	11.8	15.8
Party Size⁴			
Average	2.2	2.2	2.3
Repeat Visits			
For Pleasure	11 %	33 %	24 %
For Business	1	3	3
Total Pleasure and Business	11	39	26

¹Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.
²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.
³Computed excluding seasonal workers.
⁴Computed excluding parties of 10 or more.

Demographics: There were significant differences in age, gender and employment status among Vacation/Pleasure travel type groups. Package visitors were the oldest of all groups at 55, and slightly more likely to be female (53%) than other travel type groups. Package VPs were just as likely to be employed (46%) as retired (45%).

Independent VPs were the youngest of the travel type groups with an average age of 43, and more likely than all groups to be male (55%) and employed (58%).

Demographics for Inde-Package Vacation/Pleasure visitors were between those of Package and Independent VPs. Average age was 47, and Inde-Package travelers were slightly more likely to be male (53%). Half (49%) of Inde-Package VPs were employed, while 38% were retired.

Table III-C

**Demographics by Travel Type
Percent of Sampled Vacation/Pleasure Visitors
Summer 1993**

	Package	Pure Independent	Inde-Package ¹
Age			
Average	54.6	42.8	47.1
Gender			
Male	47 %	55 %	53 %
Female	53	45	47
Employment Status			
Employed	46 %	58 %	49 %
Retired	45	25	38
Other	9	17	12

¹ Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

Origin: Most Vacation/Pleasure visitors traveled from the United States, primarily the West. The South was the second largest contributor of VP visitors.

Package VPs were more likely to originate in the U.S (84%) than Independent and Inde-Package visitors, but slightly less likely to have originated in Canada (9%) or Overseas (6%) than either group.

While the majority of Independent VPs also came from the United States, they were more likely than any other group to travel to Alaska from Canada (16%) and Overseas (10%). The European countries alone represented 7% of Independent VPs.

Again, most Inde-Package visitors originated from the United States (79%). Like the Independent VP, the Inde-Package VP was more likely than the average VP to come from Canada (14%). However, they were not more likely to arrive from Overseas.

Table III-D

Origin by Travel Type
Percent of Sampled Vacation/Pleasure Visitors
Summer 1993

Origin	All VPs	Package	Pure Independent	Inde-Package ¹
Total U.S.	80 %	84 %	73 %	79 %
West	30	26	36	34
California	14	14	14	13
Washington	6	4	8	8
Midwest	17	18	13	17
South	21	24	17	20
East	12	16	8	9
Total Canada	12 %	9 %	16 %	14 %
Yukon	2	—	8	2
British Columbia	4	4	3	3
Ontario	2	2	2	2
Alberta	2	2	2	4
Total Overseas	8 %	6 %	10 %	7 %
Total Europe	5	4	7	5
Germany/Switzerland/ Austria	3	2	5	3
Great Britain	1	2	1	1
Total Pacific Region	2	2	3	2
Japan	1	1	1	1
Australia/New Zealand	1	1	1	1
Other	<1	<1	<1	<1
Total	100 %	100 %	100 %	100 %

¹Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

Table III-E

Visitor Arrivals By Place of Origin of Sampled Vacation Pleasure Visitors Summer 1993

	Total Visitors	% of Total Visitors
West	178,300	30.0%
California	81,500	13.7
Washington	33,200	5.6
Oregon	15,000	2.5
Colorado	12,800	2.2
Arizona	10,700	1.8
Utah	5,200	0.9
Montana	4,200	0.7
New Mexico	4,100	0.7
Idaho	4,100	0.7
Hawaii	3,500	0.6
Nevada	2,900	0.5
Wyoming	1,000	0.2
South	126,000	21.2%
Florida	33,500	5.6
Texas	25,600	4.3
Georgia	9,600	1.6
Virginia	9,300	1.6
Alabama	6,500	1.1
Maryland	6,100	1.0
Louisiana	6,000	1.0
Tennessee	6,000	1.0
Oklahoma	4,500	0.8
Arkansas	2,500	0.4
Kentucky	2,500	0.4
West Virginia	2,100	0.4
South Carolina	1,300	0.2
Delaware	1,100	0.2
District of Columbia	1,100	0.2
Mississippi	500	0.1
Midwest	98,000	16.5%
Illinois	17,500	2.9
Michigan	16,000	2.7
Ohio	15,200	2.6
Minnesota	12,700	2.1
Wisconsin	8,400	1.4
Missouri	8,100	1.4
Indiana	7,900	1.3
Iowa	5,800	1.0
Nebraska	2,200	0.4
Kansas	1,900	0.3
South Dakota	1,500	0.3
North Dakota	800	0.1

Table III-E continued

	Total Visitors	% of Total Visitors
East	73,700	12.4%
New York	26,000	4.4
Pennsylvania	15,200	2.6
New Jersey	15,100	2.5
Massachusetts	7,900	1.3
Connecticut	4,500	0.8
Maine	2,500	0.4
Rhode Island	1,500	0.3
New Hampshire	1,100	0.2
Vermont	100	-
TOTAL UNITED STATES	476,100	80.1%
CANADA	70,200	11.8%
British Columbia	22,800	3.8
Yukon	14,400	2.4
Alberta	11,900	2.0
Ontario	11,300	1.9
Saskatchewan	3,200	0.5
Quebec	2,600	0.4
Manitoba	2,400	0.4
Nova Scotia	1,300	0.2
New Brunswick	200	-
Northwest Territories	100	-
OVERSEAS	43,600	7.5%
Europe Total	27,900	4.7
Germany	10,300	1.7
Great Britain	7,900	1.3
Switzerland	5,300	0.9
Austria	500	0.1
France	200	-
Other Europe		
(Belgium, Italy, Norway, The Netherlands, Sweden, Denmark, Spain, Czechoslovakia, Luxembourg)	3,700	0.5
Pacific Region Total	12,400	2.1%
Australia/New Zealand	6,100	1.0
Japan	4,700	0.8
Other Pacific Region		
(Philippines, Korea, Taiwan, Tahiti, Indonesia, People's Republic of China, Hong Kong Thailand, S.E. Asia)	1,600	0.3
Other Overseas	3,300	0.7%
Central - South America	2,700	0.5
Africa/Middle East, Former Soviet Union, Other	600	0.2
UNKNOWN	4,400	0.7%
TOTAL VISITOR ARRIVALS	594,200*	100.0%

* Sampled Visitors Only - Study results are of sampled visitors only. By definition, this includes the nearly 97% of visitor flows sampled in the survey process.

Visiting Friends and Relatives Visitor Profile

Market Size: Visiting Friends and Relatives (VFRs) comprised 11% of the total Summer 1993 visitor market, down slightly from 15% during Summer 1989. VFRs were the second largest main trip purpose group during the summer months.

Entry Mode and Intended Exit Mode: Domestic Air was the primary entry and exit mode for 90% of VFRs traveling to and from the state. Highway was the next most popular mode transporting nearly 10% of VFRs. Ferry was used slightly less (3%), while International Air and Cruise Ships were used little by VFRs (1%).

Intended Travel Type: VFRs were primarily Independent travelers (97%). Most traveled as Pure Independents (83%) with no intention of purchasing packages once they were in Alaska. Very few VFRs traveled on a Package trip (3%).

Intended Stay: As in previous sampled years, VFRs spent an average of 15 nights in the state. VFRs were more likely to stay longer than any other trip purpose group with the exception of Seasonal Workers. More than one-third (35%) spent 7-13 nights in the state, while 41% intended to stay more than 14 nights in the state.

Party Size: The average party size for VFRs was 1.8. Nearly four in ten (38%) traveled in pairs, while almost half (46%) traveled in parties of one.

Repeat Visits: Overall, half of all VFRs have been to Alaska for business and/or pleasure within the last five years. Nearly half (49%) of VFRs traveled for pleasure, while only 3% traveled for business in the past five years.

Origin: Four in ten (41%) of all VFRs came from the West, primarily from Washington (15%) and California (12%). However, as with VPs, the proportion of VFRs from the West has declined since Summer 1989, while the proportions from the South and East have grown.

Demographics: Overall demographics were very similar to Summer 1989. The average age of the VFR visitor appeared to stabilize at 42. Just over half (54%) of all VFRs were employed and 26% were retired. Gender shifted slightly from equal numbers of males and females in 1989, to slightly more females (56%) than males (44%) Visiting Friends and Relatives during Summer 1993.

Table III-F

VFR Visitor Profile

	Without May Without Skagway ¹			With May With Skagway 1993
	1985	1986	1989	
Market Size				
VFR	17 %	14 %	16 %	11 %
Entry Mode				
Domestic Air	92 %	78 %	88 %	89 %
Cruise Ship	4	-	-	<1
Highway ²	2	17	8	5
Ferry	2	3	2	4
International Air	n/a	2	1	1
Intended Exit Mode				
Domestic Air	91 %	77 %	87 %	90 %
Cruise Ship	2	-	1	-
Highway	3	17	10	6
Ferry	2	4	2	3
International Air	n/a	1	1	1
Intended Travel Type				
Package	5 %	2 %	3 %	3 %
Independent Total	96	98	97	97
Pure Independent	95	89	68	83
Inde-Package ³	1	9	29	14
Intended Stay - Average # Nights⁴	18	15	15	15
0 Nights	0 %	0 %	1 %	2 %
1-2	1	2	4	4
3-6	7	13	18	17
7-13	31	39	35	35
14-20	33	24	21	18
21+	28	22	22	23
Party Size - Average⁵	2.0	1.9	2.0	1.8
Origin				
West	55 %	59 %	51 %	43 %
California	14	18	12	12
Washington	13	23	16	15
Midwest	22	20	18	15
South	15	14	16	19
East	7	4	8	14
Canada	1	n/a	1	4
Overseas	n/a	3	3	4
Age - Average	51	47	42	42

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are Motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

Business Only Visitor Profile

Market Size: Business Only (BO) visitors were the third largest trip purpose group, comprising 10% of the total visitor market and accounting for 84,900 of all visitors during Summer 1993.

Entry Mode and Intended Exit Mode: Nine in ten BOs used Domestic Air as their primary transportation mode to and from the state. All other transportation modes (Highway, Cruise Ship, Ferry and International Air) each carried less than one in ten BOs to and from the state.

Intended Travel Type: Most BOs traveled as Independents (90%). One-tenth (10%) of BOs claimed they traveled on a package trip. This may have included those who identified themselves as package visitors because their employer made their travel and lodging arrangements for them. In reality, these BOs were Independent travelers because while their travel and lodging arrangements were made for them, they were likely not paid for in a single price in advance.

Intended Stay: Business Only visitors intended to spend an average of nine nights in the state, the same number of nights as Vacation/Pleasure visitors. BOs and VPs spent fewer nights in the state than any other trip purpose group. Nearly 41% of BOs planned to stay between 3-6 nights, while 13% intended to stay between 7-13 nights.

Party Size: Business Only visitors were more likely to travel alone, with an average party size of 1.3 during Summer 1993, exactly the same as Summer 1989. BOs had the smallest party size of any trip purpose group.

Repeat Visits: More than three-quarters (79%) of Business Only visitors have visited Alaska within the last five years for business, more than any other trip purpose group. Likewise, only 15% of BOs have made repeat visits to the state for pleasure, fewer than any other trip purpose group.

Origin: Business Only visitors were most likely to originate from the West (60%), however, 18% of BOs came from the South. All other regions of origin (Midwest, East, Canada and Overseas) each produced less than one-tenth of the Business Only visitors.

Demographics: Business Only visitors were the youngest visitors of all trip purpose groups, with an average age of 37 just as in 1989. BOs were much more likely to be male (88%) and virtually all BOs were employed (99+%).

Table III-G

Business Only Visitor Profile

	Without May Without Skagway ¹			With May With Skagway 1993
	1985	1986	1989	
Market Size				
Business Only	10 %	10 %	7 %	10 %
Entry Mode				
Domestic Air	97 %	97 %	93 %	96 %
Cruise Ship	-	-	-	-
Highway ²	3	-	1	1
Ferry	-	-	-	<1
International Air	n/a	3	6	2
Intended Exit Mode				
Domestic Air	93 %	93 %	88 %	93 %
Cruise Ship	-	1	1	-
Highway	-	-	1	2
Ferry	-	-	-	-
International Air	3	5	8	3
Intended Travel Type				
Package	9 %	11 %	14 %	10 %
Independent Total	91	89	86	90
Pure Independent	91	89	83	90
Inde-Package ³	-	-	3	<1
Intended Stay - Average # Nights⁴	13	18	11	9
0 Nights	3 %	7 %	3 %	2 %
1-2	23	26	20	25
3-6	33	36	35	41
7-13	17	15	19	13
14-20	8	6	4	8
21+	17	10	18	11
Party Size - Average⁵	1.4	1.3	1.3	1.3
Origin				
West	71 %	68 %	60 %	60 %
California	18	22	14	15
Washington	31	35	35	33
Midwest	1	8	3	8
South	17	13	26	18
East	7	5	3	5
Canada	1	2	3	3
Overseas	3	4	6	4
Age - Average	40	42	38	37

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

Business and Pleasure Visitor Profile

Market Size: Business and Pleasure visitors (BPs) were the fourth largest trip purpose group, comprising 7% of the total visitor market and representing 55,800 total visitors during Summer 1993.

Entry Mode and Intended Exit Mode: Business and Pleasure visitors primarily used Domestic Air for travel to and from the state. One in ten BPs used Highway and Cruise Ship as their primary entry or exit mode. Very few BPs traveled by Ferry or International Air.

Intended Travel Type: Nearly nine in ten (87%) Business and Pleasure visitors were Independent travelers. Two in ten (18%) were Inde-package visitors which included those BPs planning to purchase sightseeing trips while in Alaska. Only one in ten (14%) BPs were on a Package trip.

Intended Stay: Business and Pleasure visitors spent approximately 13 nights (12.5) in the state, down from 15 nights during Summer 1989. Next to Visiting Friends and Relatives visitors, BPs spent the most nights in Alaska.

Party Size: BPs were more likely to travel in pairs, with an average party size of 1.7 during Summer 1993.

Repeat Visits: Over half (57%) of Business and Pleasure visitors have taken a trip to Alaska for business and/or pleasure in the past five years. One-quarter (25%) have traveled to Alaska for business, while exactly half (50%) have taken a pleasure trip in the past five years. Next to Business Only visitors, BPs were more likely to have made a repeat visit than any other main trip purpose group in the summer months.

Origin: More Business and Pleasure visitors originated from the West than any other region (57%), with most originating from California and Washington. One in ten BPs originated from the Midwest, South and Canada each.

Demographics: The average Business and Pleasure visitor was 40 years old, more likely to be male (64%) than female (36%) and more likely to be employed (82%) than retired (8%).

Table III-H

Business & Pleasure Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway 1993
	1985	1986	1989	
Market Size				
Business & Pleasure	8 %	6 %	9 %	7 %
Entry Mode				
Domestic Air	75 %	82 %	79 %	83 %
Cruise Ship	10	8	12	5
Highway ²	10	5	4	8
Ferry	4	3	3	2
International Air	n/a	2	2	2
Intended Exit Mode				
Domestic Air	73 %	83 %	79 %	82 %
Cruise Ship	9	7	13	5
Highway	9	4	6	7
Ferry	4	2	1	<1
International Air	n/a	1	1	5
Intended Travel Type				
Package	22 %	15 %	26 %	14 %
Independent Total	78	86	74	87
Pure Independent	75	83	50	69
Inde-Package ³	3	3	24	18
Intended Stay - Average # Nights⁴	18	10	15	13
0 Nights	0 %	1 %	1 %	3 %
1-2	10	1	5	8
3-6	30	39	32	41
7-13	29	32	27	28
14-20	17	17	16	9
21+	14	9	20	11
Party Size - Average⁵	2.1	1.4	1.8	1.7
Origin				
West	64 %	51 %	56 %	57 %
California	21	16	14	21
Washington	24	22	27	19
Midwest	14	13	10	12
South	15	17	21	14
East	4	11	4	4
Canada	3	4	3	8
Overseas	n/a	4	4	5
Age - Average	41	40	39	40

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

Seasonal Worker Visitor Profile

Market Size: Seasonal Workers (SWs) were the smallest trip purpose group, accounting for 13,200 visitors, or 2% of the total visitor market during Summer 1993. Seasonal workers include pipeline and fish-processing workers, loggers, fishermen and military personnel on temporary duty assignments. It did not include military personnel who were in Alaska as a duty station.

Entry Mode and Intended Exit Mode: Domestic Air was the primary entry and exit mode for 66% of Seasonal Workers. Highway and Ferry each carried more than 16% of SWs to and from the state. Very few Seasonal Workers traveled by International Air and Cruise Ship and a small number had not decided how they were going to exit the state.

Intended Travel Type: The majority of Seasonal Workers were Independents (84%), with 6% traveling on their own but planning to purchase sightseeing while in Alaska on their trip. A small number (16%) of Seasonal Workers claimed they traveled on a Package trip, which may include SWs who perceived themselves as having travel arrangements, meals and lodging provided by their employer, such as cannery workers or loggers staying in a bunkhouse and eating in a cookhouse. In reality, these SWs were primarily independent travelers as the cost for their transportation, meals and lodging, while supplied by their employer, was eventually deducted from their paychecks.

Party Size: The average party size for Seasonal Workers was 1.6. The majority (65%) traveled in pairs, while 22% traveled as individuals.

Repeat Visits: Overall, 63% of Seasonal Workers have been to Alaska for business and/or pleasure within the past five years. Over half (58%) of all SWs had previously visited for business, while 14% have visited Alaska for pleasure in the past five years.

Origin: Most Seasonal Workers originated from the West (60%), with 20% arriving from Washington and one in ten 11% originating from California. The South produced 20% of SWs while the Midwest and East each contributed one-tenth of Seasonal Workers. Virtually no Seasonal Workers originated in Canada or Overseas.

Demographics: The average Seasonal Worker was 25 years old, more likely to be male (75%) and more likely to be employed (89%) than looking for work after arriving in Alaska (8%).

Table III-I

Seasonal Worker Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway
	1985	1986	1989	1993
Market Size				
Seasonal Worker	4 %	2 %	3 %	2 %
Entry Mode				
Domestic Air	74 %	72 %	85 %	68 %
Cruise Ship	-	-	-	-
Highway ²	22	26	5	17
Ferry	4	-	2	15
International Air	-	2	6	-
Intended Exit Mode				
Domestic Air	74 %	62 %	87 %	66 %
Cruise Ship	-	-	-	4
Highway	7	1	5	15
Ferry	4	-	1	13
International Air	-	1	5	<1
Undecided	15	27	1	2
Intended Travel Type				
Package	-	-	13 %	16 %
Independent Total	100	100	88	84
Pure Independent	97	100	85	78
Inde-Package ³	3	-	3	6
Party Size - Average⁴	1.4	1.4	1.5	1.6
Origin				
West	74 %	65 %	65 %	60 %
California	12	25	18	11
Washington	54	31	32	20
Midwest	6	12	7	11
South	13	15	9	20
East	5	5	6	7
Canada	2	1	-	-
Overseas	n/a	2	5	-
Age - Average	27	28	29	25

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding parties of 10 or more.

Table III-J

Summary Profile

Visitors by Main Trip Purpose

	Grand Total	← BUSINESS →			← PLEASURE →			Sea- sonal
		Total	Bus. Only	Bus. & Pleasure	Total	Vac/ Pleasure	VFR	
Market Significance								
% of Total Visitors	100 %	17 %	10 %	7 %	82 %	71 %	11 %	2 %
Entry Mode	%	%	%	%	%	%	%	%
% Domestic Air	53	91	96	83	45	38	89	68
% International Air	2	2	2	2	2	2	1	—
% Cruise Ship	30	2	—	5	36	41	<1	—
% Ferry	4	<1	—	2	4	4	4	15
% Highway ¹	12	4	1	8	14	15	5	17
Intended Exit Mode								
% Domestic Air	55	89	93	82	47	41	90	66
% International Air	2	4	3	5	2	2	1	<1
% Cruise Ship	27	2	—	5	33	38	—	4
% Ferry	3	<1	—	<1	3	3	3	13
% Highway	13	4	2	7	15	16	6	15
Intended Travel Type								
% Package Tour	44	11	10	14	51	58	3	16
% Independent Total	57	89	90	87	50	42	97	84
% Pure Independent	44	82	90	69	36	28	83	78
% Inde-Package ²	13	7	<1	18	14	14	14	6
Intended Stay³								
Average # of Nights	10	11	9	13	10	9	15	—
Party Size⁴								
Average # of Persons	2.1	1.5	1.3	1.8	2.2	2.3	2.0	1.6
Repeat Visits (Last 5 Yrs.)								
% Repeating for Pleasure	23	19	15	25	25	20	49	14
% Repeating for Business	14	68	79	50	2	2	3	58
% Repeating, Total	33	71	80	57	2	21	50	63
Origin								
% West	37	59	60	57	32	30	43	60
% Midwest	15	10	8	12	16	17	15	11
% South	20	16	18	14	21	21	19	20
% East	11	4	5	4	13	12	14	7
% Canada	10	5	3	8	11	12	4	—
% Overseas	6	4	4	5	7	8	4	—
Average Age	48	38	37	40	49	50	42	25
Gender								
Male	53	77	88	64	50	50	44	75
Female	47	23	12	36	50	50	56	25
Employment Status								
% Employed	56	91	100	82	50	50	54	89
% Retired	33	4	<1	8	37	38	26	<1
% Other	12	7	2	12	13	12	20	8

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.² Inde-Package visitors are independents who plan to purchase sightseeing tours during their trip.³ Computed excluding seasonal workers.⁴ Computed excluding parties of 10 or more.

Chapter IV:

Entry Mode Profiles

Chapter IV: Entry Mode Profiles

Domestic Air Visitors

Cruise Ship Visitors

Highway Visitors

Ferry Visitors

International Air Visitors

Domestic Air Visitor Profile

Market Size: Domestic Air was the most widely used entry mode carrying over half (53%) of all visitor arrivals or 443,600 people. Domestic Air brought 38% or 227,800 Vacation/Pleasure visitors into the state.

Main Trip Purpose: More than two-thirds (69%) of Domestic Air visitor arrivals came for pleasure purposes, that is, for Vacation and to Visit Friends and Relatives.

Intended Exit Mode: Eight in ten (83%) Domestic Air visitors intended to exit Alaska by Domestic Air, while 13% planned to leave the state via Cruise Ship. Very few Domestic Air visitor arrivals intended to exit Alaska by Highway, Ferry or International Air.

Intended Travel Type: Three-quarters (75%) of Domestic Air entries were Independent travelers. One-quarter (25%) of Domestic Air visitor arrivals were on a Package trip.

Intended Stay: Domestic Air visitor arrivals spent an average of 11 nights in the state, staying less time than visitors arriving by all other entry modes except Cruise Ship.

Party Size: Domestic Air visitors had an average party size of 1.9, the smallest of all entry mode groups. Business visitors, which primarily travel by Domestic Air as individuals, may have influenced the average party size of this mode.

Repeat Visits: Domestic Air visitors arrivals were more likely to have visited Alaska for business and/or pleasure in the past five years than any other entry mode group (46%). Nearly one-quarter (23%) of Domestic Air visitors have been to Alaska for business, while nearly 28% have visited for pleasure in the past five years.

Origin: The West produced most Domestic Air visitor arrivals (46%), followed by the South (21%). Though small, a growing number of Overseas visitors arrived by this mode.

Demographics: The average Domestic Air visitor arrival was 44 years old, younger than all other entry mode group visitors with the exception of International Air visitors. Over half of Domestic Air visitors arrivals were employed (66%), while two in ten (23%) were retired. Domestic Air entries were slightly more likely to be male (58%).

Table IV-A

Domestic Air Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway
	1985	1986	1989	1993
Market Size				
Domestic Air	54 %	52 %	55 %	53 %
Cruise Ship	31	28	28	30
Highway ²	10	12	9	12
Ferry	5	5	5	3
International Air	n/a	2	3	2
Main Trip Purpose				
Vacation/Pleasure	36 %	48 %	45 %	51 %
VFR	30	20	26	18
Business & Pleasure	12	10	13	10
Business Only	18	19	12	18
Seasonal Worker	5	3	5	2
Intended Exit Mode				
Domestic Air	87 %	84 %	85 %	83 %
Cruise Ship	9	11	11	13
Highway	1	2	1	<1
Ferry	1	1	1	<1
International Air	n/a	1	1	2
Intended Travel Type				
Package	17 %	17 %	24 %	25 %
Independent Total	81	79	76	75
Pure Independent	81	79	54	64
Inde-Package ³	n/a	n/a	22	11
Intended Stay - Average # Nights⁴	14	12	9	11
0 Nights	1 %	1 %	1 %	-
1-2	8	9	5	8
3-6	19	25	21	29
7-13	35	39	42	37
14-20	23	16	18	16
21+	16	10	13	10
Party Size⁵				
Average	2.0	1.7	2.0	1.9
Origin				
West	55 %	59 %	52 %	46 %
California	16	21	16	16
Washington	18	22	19	16
Midwest	18	16	15	15
South	17	16	21	21
East	7	7	9	11
Canada	1	1	1	2
Overseas	n/a	1	2	4
Age - Average	46	46	42	44

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoach and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

Cruise Ship Visitor Profile

Market Size: Cruise Ship was the second largest entry mode among visitors, accounting for 30% of the total visitor arrivals or 247,000 people. More than four in ten (41%) of Vacation/Pleasure visitors arrived by Cruise Ship.

Main Trip Purpose: Virtually all (99%) Cruise Ship entries were Vacation/Pleasure visitors. A few (1%) Cruise Ship visitor arrivals were traveling for Business and Pleasure.

Intended Exit Mode: Over two-thirds of Cruise Ship entries were round-trip visitors. That is, they intended to exit by the same mode. Nearly one-third (32%) planned to leave the state by Domestic Air.

Intended Travel Type: Virtually all cruise visitor arrivals were on a Package trip, more than visitors traveling by any other entry mode.

Intended Stay: Cruise Ship entries spent an average of 6 nights (5.7) in the state, fewer than any other entry mode group. Nearly three-quarters (71%) planned to stay between 3-6 nights, while 25% intended to spend between 7-13 nights.

Party Size: Most Cruise Ship visitor arrivals traveled in pairs, with an average party size of 2.2 people, which was slightly larger than the overall average visitor party size of 2.1 people.

Repeat Visits: Cruise Ship visitor arrivals have made the least number of trips to Alaska for business and/or pleasure than any entry mode group. One in ten (9%) Cruise Ship entries have visited Alaska for pleasure, while only a small number (1%) have visited for business in the past five years.

Origin: Most Cruise Ship visitor arrivals came from the West and South, with each region producing 26%. The proportion of visitors originating from the West declined since 1989, while the proportion of visitors coming from the South grew.

Demographics: Cruise Ship visitor arrivals were older than all other entry mode visitors, with an average age of 55. Cruise Ship entries were the only entry mode group with slightly more females (55%) than males (45%), and were nearly as likely to be employed (45%) as retired (46%).

Table IV-B

Cruise Ship Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway
	1985	1986	1989	1993
Market Size				
Domestic Air	54 %	52 %	55 %	53 %
Cruise Ship	31	28	28	30
Highway ²	10	12	9	12
Ferry	5	5	5	3
International Air	n/a	2	3	2
Main Trip Purpose				
Vacation/Pleasure	95 %	98 %	96 %	99 %
VFR	2	—	—	—
Business & Pleasure	3	2	4	1
Business Only	—	—	—	—
Seasonal Worker	—	—	—	—
Intended Exit Mode				
Domestic Air	24 %	30 %	31 %	32 %
Cruise Ship	73	69	68	68
Highway	1	1	—	—
Ferry	—	—	—	—
International Air	n/a	—	1	<1
Intended Travel Type				
Package	100 %	100 %	99 %	99 %
Independent Total	—	—	2	1
Pure Independent	—	—	1	1
Inde-Package ³	n/a	n/a	1	—
Intended Stay - Average # Nights⁴	7	7	5	6
0 Nights	0 %	7 %	—	—
1-2	4	2	—	2
3-6	45	52	76	71
7-13	45	34	22	25
14-20	6	4	1	1
21+	1	2	—	—
Party Size⁵				
Average	2.3	2.1	2.4	2.2
Origin				
West	45 %	39 %	35 %	26 %
California	29	26	23	15
Washington	5	4	4	3
Midwest	17	20	16	15
South	20	21	20	26
East	13	14	15	11
Canada	4	4	11	12
Overseas	n/a	2	3	5
Age - Average	59	58	55	55

¹ Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

² Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³ Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴ Computed excluding seasonal workers.

⁵ Computed excluding parties of 10 or more.

Highway Visitor Profile

Market Size: Highway was the third largest entry mode into the state during Summer 1993, comprising 12% of total visitor arrivals or 104,000 people. The Highway brought 15% or 91,500 Vacation/Pleasure visitors to Alaska.

Main Trip Purpose: The primary trip purpose of Highway visitor arrivals was Vacation/Pleasure (88%). Less than 1% of Highway entries traveled to Alaska for each of the remaining trip purposes (Visit Friends and Relatives, Business and Pleasure, Business Only, Seasonal Worker).

Intended Exit Mode: Most Highway visitor arrivals intended to exit the state by Highway (88%), while nearly 7% intended to leave by Ferry. Very few Highway entries intended to exit by Domestic Air, Cruise Ship or International Air.

Intended Travel Type: Virtually all (99+%) Highway entries were Independent travelers, with 35% planning to purchase sightseeing trips while in Alaska.

Intended Stay: Visitors arriving by Highway intended to stay longer than all other entry mode groups except ferry visitor arrivals, and spent approximately 15 nights (14.9) in Alaska. Nearly three in ten (27%) planned to stay three weeks or longer in Alaska.

Party Size: Highway entries had an average party size of 2.3 people, the largest of all entry mode groups except ferry entries, and slightly higher than the overall average visitor party size of 2.1 people.

Repeat Visits: Over one-third (37%) of Highway visitors have been to Alaska in the past five years, mostly for pleasure (36%). Only 7% have visited Alaska for business.

Origin: Most highway entries originated from Canada (38%), while one quarter (23%) of Highway visitors came from the West and one-tenth each arrived from the South, Midwest and Overseas.

Demographics: Highway visitor arrivals were slightly younger than the average Alaska visitor, with an average age of 44. Highway entries were slightly more likely to be male and slightly more likely to be employed (47%) than retired (36%).

Table IV-C

Highway Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway
	1985	1986	1989	1993
Market Size				
Domestic Air	54 %	52 %	55 %	53 %
Cruise Ship	31	28	28	30
Highway ²	10	12	9	12
Ferry	5	5	5	3
International Air	n/a	2	3	2
Main Trip Purpose				
Vacation/Pleasure	78 %	73 %	79 %	88 %
VFR	3	19	14	4
Business & Pleasure	8	3	4	4
Business Only	31	—	1	1
Seasonal Worker	8	5	2	2
Intended Exit Mode				
Domestic Air	—	4 %	4 %	3 %
Cruise Ship	6	1	—	—
Highway	67	73	92	89
Ferry	20	15	4	7
International Air	—	1	—	<1
Intended Travel Type				
Package	8 %	—	1 %	<1 %
Independent Total	81	66	99	100
Pure Independent	81	66	67	65
Inde-Package ³	n/a	n/a	32	35
Intended Stay - Average # Nights⁴	21	21	18	15
0 Nights	2 %	4 %	2 %	10 %
1-2	6	4	3	14
3-6	12	10	14	15
7-13	25	21	26	17
14-20	23	21	25	17
21+	33	41	30	27
Party Size⁵				
Average	2.4	2.3	2.4	2.3
Origin				
West	38 %	36 %	34 %	23 %
California	10	13	10	6
Washington	10	6	8	5
Midwest	24	23	21	16
South	14	19	14	10
East	6	7	5	4
Canada	15	12	22	38
Overseas	n/a	3	4	8
Age - Average	44	50	49	44

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

Ferry Visitor Profile

Market Size: Visitors arriving by Ferry accounted for 4% or 29,100 of total visitor arrivals. The Ferry also brought 4% or 22,400 Vacation/Pleasure visitors.

Main Trip Purpose: Most Ferry visitor arrivals were Vacation/Pleasure visitors (77%), while one in ten (12%) were Visiting Friends and Relatives. A few Business and Pleasure visitors and Seasonal Workers entered by Ferry, but Business Only visitors were least inclined to travel by Ferry.

Intended Exit Mode: Four in ten (40%) Ferry entries intended to depart by Ferry, although nearly as many intended to leave by Highway (38%). A few planned to exit Alaska by Domestic Air (18%), while only a handful planned to leave by Cruise Ship or International Air.

Intended Travel Type: A large majority of Ferry entries were Independents (90%), with 28% Pure Independents and 62% planning to purchase sightseeing while in Alaska on their trip. Only one-tenth (11%) of Ferry entries were on a Package trip.

Intended Stay: Ferry entries spent more nights in the state than any other entry mode group, staying approximately 19 nights (18.7). One-third (33%) intended to stay between 7-13 nights.

Party Size: Most Ferry visitor arrivals traveled in pairs, with an average party size of 2.3 persons. Over half traveled as couples, (55%), while (19%) traveled as individuals.

Repeat Visits: Two in ten (20%) of Ferry visitor arrivals have been to Alaska within the past five years, mostly for pleasure (17%). Only 5% have been to Alaska for business.

Origin: The West was the primary producer of Ferry entries, accounting for 43% of Ferry visitor arrivals. Close to one-tenth of Ferry visitor arrivals came from each of the remaining regions (Midwest, South, East, Canada, Overseas).

Demographics: The average Ferry visitor arrival was 48 years old, the same as the average Alaska visitor. Nearly equal numbers of Ferry entries were male (51%) and female (49%), while Ferry visitor arrivals were slightly more likely to be employed, (46%) than retired (40%).

Table IV-D

Ferry Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway 1993
	1985	1986	1989	
Market Size				
Domestic Air	54 %	52 %	55 %	53 %
Cruise Ship	31	28	28	30
Highway ²	10	12	9	12
Ferry	5	5	5	3
International Air	n/a	2	3	2
Main Trip Purpose				
Vacation/Pleasure	82 %	86 %	84 %	77 %
VFR	8	10	8	12
Business & Pleasure	7	4	5	3
Business Only	—	1	—	<1
Seasonal Worker	4	—	3	7
Intended Exit Mode				
Domestic Air	21 %	27 %	14 %	18 %
Cruise Ship	1	—	—	—
Highway	26	30	47	38
Ferry	46	37	34	40
International Air	n/a	1	2	2
Intended Travel Type				
Package	11 %	31 %	19 %	11 %
Independent Total	86	69	81	90
Pure Independent	86	69	28	28
Inde-Package ³	n/a	n/a	53	62
Intended Stay - Average # Nights⁴	18	14	17	19
0 Nights	— 1	1 %	—	—
1-2	8	3	6	5
3-6	18	20	18	15
7-13	26	33	29	33
14-20	17	18	19	15
21+	31	25	28	33
Party Size⁵				
Average	2.4	2.1	2.5	2.3
Origin				
West	50 %	40 %	40 %	43 %
California	18	19	11	14
Washington	12	8	11	12
Midwest	18	20	17	14
South	13	13	16	12
East	7	10	10	7
Canada	8	13	10	10
Overseas	n/a	4	7	14
Age - Average	45	47	48	48

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

International Air Visitor Profile

Market Size: International Air carried 2% of all visitors or 13,300 people into Alaska during Summer 1993. International Air also carried 2% of Vacation/Pleasure visitors into Alaska.

Main Trip Purpose: The primary trip purpose of International Air arrivals was Vacation/Pleasure (70%), while 14% traveled for Business Only. Less than one-tenth came for each of the remaining trip purpose groups (BP, VFR, SW).

Intended Exit Mode: The majority of International Air entries (81%) also intended to exit the state by International Air. One in ten (14%) planned to leave Alaska via a Domestic carrier.

Intended Travel Type: Over half (58%) of International Air entries were Independent travelers, with 7% planning to purchase sightseeing while in Alaska. Four in ten (42%) International Air visitor arrivals were on a Package trip.

Intended Stay: The average length of stay in Alaska for International Air entries was 13.0 nights. Just over one-third (35%) planned to stay between 3-6 nights, while nearly one-quarter intended to stay between 7-13 nights.

Party Size: The average party size for International Air entries was 2.0. Four in ten (45%) traveled as individuals, while three in ten (34%) traveled in pairs.

Repeat Visits: Nearly three in ten (29%) International Air entries have been to Alaska in the last five years, with nearly as many having visited for business (13%) as pleasure (18%).

Origin: The majority of International Air visitor arrivals were from foreign countries (82%), primarily from the Pacific Region countries of Japan, Australia and New Zealand, which together supplied 40% of International Air entries. The European countries of Germany/Switzerland/Austria and Great Britain together produced one-quarter (26%) of Overseas visitor arrivals. Overseas origin does not add up to 100% because 9% of sampled overseas visitors refused the survey process.

Demographics: With an average age of 39, International Air visitor arrivals were the youngest of all entry mode groups. Slightly more males (58%) traveled by International Air. Two-thirds (66%) were employed and 23% were retired.

Table IV-E

International Air Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway
	1985	1986	1989	1993
Market Size				
Domestic Air	54 %	52 %	55 %	53 %
Cruise Ship	31	28	28	30
Highway ²	10	12	9	12
Ferry	5	5	5	3
International Air	n/a	2	3	2
Main Trip Purpose				
Vacation/Pleasure	n/a	69 %	70 %	70 %
VFR	n/a	11	6	7
Business & Pleasure	n/a	5	6	9
Business Only	n/a	13	15	14
Seasonal Worker	n/a	2	6	-
Intended Exit Mode				
Domestic Air	n/a	14 %	21 %	14 %
Cruise Ship	n/a	1	3	2
Highway	n/a	6	6	2
Ferry	n/a	3	1	<1
International Air	n/a	73	68	81
Intended Travel Type				
Package	n/a	24 %	21 %	42 %
Independent Total	n/a	64	80	58
Pure Independent	n/a	64	59	51
Inde-Package ³	n/a	n/a	21	7
Intended Stay - Average # Nights⁴				
0 Nights	n/a	15	14	13
1-2	n/a	1 %	2 %	<1 %
3-6	n/a	15	13	5
7-13	n/a	27	21	35
14-20	n/a	19	27	24
21+	n/a	14	19	17
Party Size⁵				
Average	n/a	1.8	2.4	2.0
Origin				
West	n/a	1 %	1 %	2 %
Midwest	n/a	-	1	2
South	n/a	1	-	3
East	n/a	4	-	2
Canada	n/a	-	-	-
Overseas	n/a	93	96	82
Age - Average	n/a	39	39	39

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks..

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

Table IV-F

Summary Profile

Visitors by Entry Mode

	Grand Total	Domestic Air	Interna- tional Air	Cruise Ship	Ferry	Highway
Market Significance						
% of Total Visitors	100%	53%	2%	30%	4%	12%
Main Trip Purpose	%	%	%	%	%	%
% Business Only	10	18	14	—	<1	1
% Business & Pleasure	7	10	9	1	3	4
% Vacation/Pleasure	71	51	70	99	77	88
% VFR	11	18	7	—	12	4
Intended Exit Mode						
% Domestic Air	55	83	14	32	18	3
% International Air	2	2	81	<1	2	<1
% Cruise Ship	27	13	2	68	—	—
% Ferry	3	<1	<1	—	40	7
% Highway ¹	13	<1	2	—	38	89
Intended Travel Type						
% Package Tour	44	25	42	99	11	<1
% Independent Total	57	75	58	1	90	100
% Pure Independent	44	64	51	1	28	65
% Inde-Package ²	13	11	7	—	62	35
Intended Stay³						
Average # of Nights	10	11	13	6	19	15
Party Size⁴						
Average # of Persons	2.1	1.9	2.0	2.2	2.3	2.3
Repeat Visits (Last 5 Yrs.)						
% Repeating for Pleasure	23	28	18	9	17	36
% Repeating for Business	14	23	13	1	5	7
% Repeating, Total	33	46	29	9	20	37
Origin						
% West	37	46	2	26	43	23
% Midwest	15	15	2	15	14	16
% South	20	21	3	26	12	10
% East	11	11	2	16	7	4
% Canada	10	2	—	12	10	38
% Overseas	6	4	82	5	14	8
Average Age	48	44	39	55	48	44
Gender						
% Male	53	58	59	45	51	56
% Female	47	42	41	55	49	44
Employment Status						
% Employed	56	66	66	45	46	47
% Retired	33	23	10	46	40	36
% Other	12	12	24	9	15	17

¹Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

²Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

³Computed excluding seasonal workers.

⁴Computed excluding parties of 10 or more.

Chapter V: Origin Profiles

Chapter V: Origin Profiles

West Region Visitors

California Visitors

Washington Visitors

South Region Visitors

Midwest Region Visitors

East Region Visitors

Canadian Visitors

Overseas Visitors

Germany/Switzerland/Austria /Japan/

Australia/New Zealand Visitors

West Region Visitor Profile

Market Size: Visitors to Alaska primarily originated from the Western U.S., comprising 37% of the total visitor arrivals or 307,600 people during Summer 1993. Washington and California are profiled separately in this chapter because of their market significance and the unique differences between them.

Main Trip Purpose: Over half (58%) of Western visitors came for Vacation/Pleasure purposes. However, the West generated a lower percentage of VP visitors than all other regions. One in ten Western visitors came for each of the remaining trip purposes (Business Only, Business and Pleasure, and Visit Friends and Relatives).

Entry Mode and Intended Exit Mode: Domestic Air was used by two-thirds (67%) of Western visitors as their primary transportation mode to and from Alaska. Cruise Ship was the second most used entry and intended exit mode for 20% of Western visitors. Less than 10% of Western visitors traveled by Highway, while a small number traveled by each of the remaining transportation modes (Ferry and International Air).

Intended Travel Type: Two-thirds (67%) of Western visitors were Independent travelers, with 13% planning to purchase sightseeing while in Alaska. One-third (33%) traveled on a package trip.

Intended Stay: Western visitors spent an average 11 nights (10.7) in Alaska, slightly longer than the average visitor who spent an average of 10 nights (10.2), but less than visitors from the Midwest or Overseas.

Party Size: The average party size for Western visitors was 2.0, nearly the same as for all visitors. Over one-third (38%) traveled as individuals, while almost one-half (46%) traveled in pairs.

Repeat Visits: Nearly half (48%) of visitors from the West have been to Alaska for business and/or pleasure in the past five years. One-third (30%) of Westerners took a trip for pleasure, while 25% traveled to Alaska for business in the past five years. The high repeat rate among Western travelers was largely influenced by the volume of Washington visitors to Alaska, especially for business purposes.

Demographics: At 45, Western visitors were slightly younger than the average visitor, but slightly older than visitors from Washington and Overseas. Western visitors were more likely to be male than female and more likely to be employed (63%) than retired (27%).

Table V-A

West Region Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway 1993
	1985	1986	1989	
Market Size				
West	50 %	48 %	43 %	37 %
California	19	21	17	14
Washington	13	14	12	10
Midwest	18	18	15	15
South	18	17	19	20
East	9	9	10	11
Canada	4	4	6	10
Overseas	n/a	3	6	6
Main Trip Purpose				
Vacation/Pleasure	51 %	60 %	54 %	58 %
VFR	19	16	19	13
Business & Pleasure	11	7	12	10
Business Only	14	14	10	17
Seasonal Worker	5	3	5	3
Entry Mode				
Domestic Air	59 %	64 %	66 %	67 %
Cruise Ship	28	23	22	21
Highway ²	8	9	7	8
Ferry	5	4	5	4
International Air	n/a	-	-	-
Intended Exit Mode				
Domestic Air	63 %	63 %	66 %	67 %
Cruise Ship	24	22	21	20
Highway	6	10	9	9
Ferry	5	3	3	3
International Air	n/a	-	-	<1
Intended Travel Type				
Package	37 %	32 %	33 %	33 %
Independent Total	63	68	67	67
Pure Independent ³	61	64	49	54
Inde-Package	2	4	18	13
Intended Stay - Average # Nights⁴	12	11	11	11
0 Nights	0 %	4 %	1 %	0 %
1-2	8	8	5	9
3-6	28	31	38	40
7-13	34	32	31	29
14-20	17	13	14	9
21+	13	13	11	12
Party Size⁵				
Average	2.0	1.8	2.1	2.0
Age - Average	49	49	44	46

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

California Visitor Profile

Market Size: California visitors comprised 14% of all visitors to Alaska, representing 117,200 people during Summer 1993.

Main Trip Purpose: The primary trip purpose for seven in ten (70%) California visitors was Vacation/Pleasure, while 10% of Californians visited Alaska for Business Only and Business and Pleasure each. Next to Canadians, visitors from California were less likely to come to Alaska to Visit Friends and Relatives (9%), while visitors from Washington were more likely to come to Alaska to Visit Friends and Relatives (15%) than any other origin group.

Entry Mode and Intended Exit Mode: Domestic Air was the primary transportation mode for two-thirds of visitors from California. Nearly one-third traveled to and from Alaska by Cruise Ship, while a small number used Highway and Ferry.

Intended Travel Type: Over half (57%) of visitors from California were Independent travelers, with 13% planning to purchase sightseeing while in Alaska on their trip. Four in ten (44%) were on a Package trip.

Intended Stay: Visitors from California spent an average of 9 nights (9.4) in Alaska, slightly fewer than the average visitor. Nearly half (42%) intended to stay between 3-6 nights, while one-third (34%) planned to stay between 7-13 nights.

Party Size: With an average party size of 2.1, visitors from California have the same party size as the average Alaska visitor. Over half (53%) traveled in parties of two, while more than one-quarter (29%) traveled as individuals.

Repeat Visits: One-third (34%) of visitors from California have been to Alaska within the past five years, primarily for pleasure (25%). One-tenth (14%) have visited Alaska for business.

Demographics: The average California visitor was 48 years old, more likely to be male (55%) and employed (61%) than retired (28%).

Table V-B

California Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway
	1985	1986	1989	1993
Market Size				
West	50 %	48 %	43 %	37 %
California	19	21	17	14
Washington	13	14	12	10
Midwest	18	18	15	15
South	18	17	19	20
East	9	9	10	11
Canada	4	4	6	10
Overseas	n/a	3	6	6
Main Trip Purpose				
Vacation/Pleasure	68 %	71 %	72 %	70 %
VFR	12	11	12	9
Business & Pleasure	9	5	8	10
Business Only	9	11	6	11
Seasonal Worker	2	3	3	1
Entry Mode				
Domestic Air	44 %	53 %	53 %	60 %
Cruise Ship	47	36	38	32
Highway ²	5	8	6	5
Ferry	4	4	3	3
International Air	n/a	—	—	—
Intended Exit Mode				
Domestic Air	49 %	52 %	54 %	61 %
Cruise Ship	40	35	37	30
Highway	4	9	7	6
Ferry	4	3	2	2
International Air	n/a	—	—	<1
Intended Travel Type				
Package	57 %	45 %	50 %	44 %
Independent Total	43	56	50	57
Pure Independent	42	54	34	44
Inde-Package ³	1	2	16	13
Intended Stay - Average # Nights⁴				
0 Nights	11	10	8	9
1-2	0 %	3 %	0 %	0 %
3-6	7	8	5	8
7-13	37	36	48	42
14-20	34	27	29	34
21+	12	14	11	7
	10	12	7	9
Party Size⁵				
Average	2.2	1.9	2.2	2.0
Age - Average				
	53	49	46	48

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

Washington Visitor Profile

Market Size: One in ten (10%) visitors to Alaska or 87,200 people, originated in Washington during Summer 1993. Visitors from Washington comprised 6% of all Vacation/Pleasure visitors to Alaska.

Main Trip Purpose: While Vacation/Pleasure was the primary trip purpose among visitors from Washington (38%), they represented the smallest proportion of Vacation/Pleasure visitors among all regions. More Washingtonians came to Visit Friends and Relatives (15%) and for Business Only (32%) than visitors from any other region.

Entry Mode and Intended Exit Mode: Visitors from Washington traveled by Domestic Air more than visitors from any other region. Eight in ten Washingtonians used Domestic Air as their primary transportation mode to and from Alaska. Less than 10% of Washington visitors used each of the remaining travel modes to enter or exit the state, even though the Highway and Ferry were more accessible to visitors from Washington than visitors from all other regions.

Intended Travel Type: Washington visitors were more likely to be Independent travelers than visitors from any other region, largely resulting from the heavy volume of business travelers to Alaska. The majority of Washington visitors were Independent travelers (70%), with (10%) intending to purchase sightseeing while in Alaska. Two in ten (20%) Washington visitors were on a Package trip.

Intended Stay: The average length of stay for Washington visitors was nearly 10 nights (9.8), near the average for all Alaska visitors (10.2). Four in ten (42%) visitors from Washington intended to stay between 3-6 nights, while nearly one-quarter (24%) planned to spend between 7-13 nights in Alaska.

Party Size: At 1.7, Washington visitors had a smaller average party size than visitors from any other region, again as a result of the high percentage of business travelers who were inclined to travel in smaller parties.

Repeat Visits: As in previous sampled years, Washingtonians were more likely to have visited Alaska in the past five years, primarily for business (45%) than visitors from all other regions. Just over one-third (35%) of visitors from Washington have visited Alaska for pleasure.

Demographics: Washington produced the youngest visitors to Alaska, with an average age of 42, six years younger than the average Alaska visitor. Visitors from Washington were much more likely to be male, (63%) and were more likely to be employed (71%) and less likely to be retired (20%) than visitors from all other regions.

Table V-C

Washington Visitor Profile

	Without May Without Skagway ¹			With May With Skagway 1993
	1985	1986	1989	
Market Size				
West	50 %	48 %	43 %	37 %
California	19	21	17	14
Washington	13	14	12	10
Midwest	18	18	15	15
South	18	17	19	20
East	9	9	10	11
Canada	4	4	6	10
Overseas	n/a	3	6	6
Main Trip Purpose				
Vacation/Pleasure	29 %	38 %	32 %	38 %
VFR	18	22	21	15
Business & Pleasure	15	10	19	12
Business Only	24	25	20	32
Seasonal Worker	15	5	8	3
Entry Mode				
Domestic Air	77 %	84 %	82 %	82 %
Cruise Ship	11	3	8	8
Highway ²	8	5	5	6
Ferry	4	3	4	4
International Air	n/a	-	-	-
Intended Exit Mode				
Domestic Air	78 %	80 %	80 %	79 %
Cruise Ship	11	8	8	9
Highway	5	7	6	7
Ferry	4	2	3	3
International Air	n/a	-	1	<1
Intended Travel Type				
Package	20 %	13 %	18 %	20 %
Independent Total	80	88	82	80
Pure Independent	79	81	65	70
Inde-Packag ³	1	7	17	10
Intended Stay - Average # Nights⁴	12	9	11	10
0 Nights	2 %	7 %	2 %	1 %
1-2	18	11	8	15
3-6	22	31	40	42
7-13	33	29	25	24
14-20	13	13	12	7
21+	12	10	13	11
Party Size⁵				
Average	1.7	1.5	1.8	1.7
Age - Average	46	47	42	42

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

South Region Visitor Profile

Market Size: The South produced the second largest volume of visitors to Alaska, accounting for 20% of the total market share or 168,000 people during Summer 1993. Of all Vacation/Pleasure visitors the South produced two in ten (21%), with Florida and Texas each supplying 5% of Southern Vacation/Pleasure visitors.

Main Trip Purpose: Three-quarters (75%) of all Southerners came to Alaska for vacation and pleasure purposes. One in ten (10%) visitors from the South came to visit friends and relatives. Very few Southerners visited Alaska for business or business and pleasure.

Entry Mode and Intended Exit Mode: Over half of Southern visitors traveled to and from Alaska by Domestic Air, while slightly more than one-third used Cruise Ship. Highway and Ferry carried only a few visitors each into the state.

Intended Travel Type: Half of all Southerners were Independent travelers, with 11% planning to purchase sightseeing while in Alaska. Half of visitors from the South were on a Package trip.

Intended Stay: The average length of stay for Southerners was 9 nights (8.9), significantly shorter than the average visitor who stayed 10.2 nights in the state. Four in ten (44%) Southerners planned to stay between 3-6 nights, while nearly one-third (32%) intended to stay between 7-13 nights.

Party Size: With an average party size of 2.1, Southerners traveled in the same party size as the average Alaska visitor. Nearly six in ten (58%) traveled as couples, while nearly one-quarter (24%) traveled as individuals.

Repeat Visits: One-quarter (26%) of Southerners took a trip to Alaska in the past five years, primarily for pleasure (19%). Only 9% of visitors from the South traveled to Alaska for business purposes.

Demographics: At 50, Southerners were slightly older than the average Alaska visitor and slightly more likely to be male (53%). Half of all visitors from the South were employed, while nearly four in ten (37%) were retired.

Table V-D

South Region Visitor Profile

	Without May Without Skagway ¹			With May With Skagway 1993
	1985	1986	1989	
Market Size				
West	50 %	48 %	43 %	37 %
California	19	21	17	14
Washington	13	14	12	10
Midwest	18	18	15	15
South	18	17	19	20
East	9	9	10	11
Canada	4	4	6	10
Overseas	n/a	3	6	6
Main Trip Purpose				
Vacation/Pleasure	67 %	73 %	66 %	75 %
VFR	14	11	13	10
Business & Pleasure	7	6	10	5
Business Only	9	8	10	9
Seasonal Worker	3	2	1	2
Entry Mode				
Domestic Air	52 %	49 %	60 %	54 %
Cruise Ship	36	34	29	38
Highway ²	8	13	7	6
Ferry	4	4	4	2
International Air	n/a	-	-	-
Intended Exit Mode				
Domestic Air	57 %	51 %	64 %	58 %
Cruise Ship	32	32	23	34
Highway	7	10	10	6
Ferry	4	4	2	1
International Air	n/a	1	1	-
Intended Travel Type				
Package	49 %	46 %	49 %	50 %
Independent Total	50	54	51	50
Pure Independent	48	41	33	39
Inde-Package ³	2	13	18	11
Intended Stay - Average # Nights⁴				
0 Nights	12	16	12	9
1-2	0 %	3 %	0 %	0 %
3-6	5	7	3	5
7-13	27	34	32	44
14-20	40	34	38	32
21+	13	10	12	12
	15	12	15	8
Party Size⁵				
Average	2.3	1.9	2.2	2.1
Age - Average	54	53	49	50

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

Midwest Visitor Profile

Market Size: Visitors from the Midwest comprised 15% of the total market share or 126,300 people, the same proportion as in Summer 1989. Illinois, Michigan and Ohio each contributed one in ten Midwest visitors. The Midwest accounted for 17% of all Vacation/Pleasure visitors.

Main Trip Purpose: Midwest visitors primarily visited Alaska for Vacation/Pleasure purposes (78%). A few (11%) came to visit friends and relatives and only a handful visited Alaska for business only or business and pleasure.

Entry Mode and Intended Exit Mode: Midwesterners used Domestic Air more than any other transportation mode (54%) to enter the state. One-third traveled to and from Alaska by Cruise Ship, while just over one in ten traveled by Highway. Visitors from the Midwest were more inclined to travel by Highway than visitors from all other regions except Overseas visitors. Ferry was used by a small percentage.

Intended Travel Type: Half (50%) of all visitors from the Midwest were Independent travelers, with 14% planning to purchase sightseeing while in Alaska, while the remaining half were on a Package trip.

Intended Stay: Midwest visitors were more likely to stay slightly longer than the average Alaska visitor at 12 nights (11.9). Nearly four in ten (38%) intended to stay between 7-13 nights, while three in ten (30%) planned to stay between 3-6 nights.

Party Size: Midwesterners were inclined to travel in pairs, with an average party size of 2.1. More than half (59%), traveled in parties of two, while one-quarter (23%) traveled as individuals.

Repeat Visits: Only 21% of Midwest visitors have been to Alaska in the past five years. Midwest visitors (15%) primarily visited Alaska for pleasure, although 9% came to Alaska for business in the past five years.

Demographics: The average Midwest visitor was 51 years old, slightly older than the average Alaska visitor and slightly older than visitors from all other regions except the East. Gender among Midwesterners was equally balanced with 50% male and 50% female. Half of Midwesterners were employed, while 41% were retired. Midwesterners were more likely to be retired than visitors from all other regions.

Table V-E

Midwest Region Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway
	1985	1986	1989	1993
Market Size				
West	50 %	48 %	43 %	37 %
California	19	21	17	14
Washington	13	14	12	10
Midwest	18	18	15	15
South	18	17	19	20
East	9	9	10	11
Canada	4	4	6	10
Overseas	n/a	3	6	6
Main Trip Purpose				
Vacation/Pleasure	71 %	75 %	73 %	78 %
VFR	21	15	19	11
Business & Pleasure	7	4	6	5
Business Only	1	5	1	6
Seasonal Worker	1	1	1	1
Entry Mode				
Domestic Air	52 %	47 %	54 %	54 %
Cruise Ship	30	31	29	29
Highway ²	13	15	12	13
Ferry	5	5	6	3
International Air	n/a	—	—	—
Intended Exit Mode				
Domestic Air	54 %	51 %	55 %	55 %
Cruise Ship	29	27	27	28
Highway	10	15	14	14
Ferry	5	7	3	3
International Air	n/a	1	1	—
Intended Travel Type				
Package	46 %	51 %	46 %	50 %
Independent Total	55	50	55	50
Pure Independent	52	44	28	36
Inde-Package ³	3	6	27	14
Intended Stay - Average # Nights⁴	14	11	11	12
0 Nights	0 %	2 %	0 %	0 %
1-2	3	1	1	2
3-6	22	24	27	30
7-13	35	43	47	38
14-20	23	18	14	19
21+	17	12	11	11
Party Size⁵				
Average	2.3	2.0	2.3	2.1
Age - Average	53	53	51	51

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

East Region Visitor Profile

Market Size: The East produced 11% of all visitors to Alaska and 12% of all Vacation/Pleasure visitors. As in past years, the East contributed the smallest volume of visitors from the U.S. Three-quarters (75%) of Eastern visitors originated in New York, Pennsylvania and New Jersey.

Main Trip Purpose: Visitors from the East primarily visited Alaska for vacation/pleasure purposes (79%), although one in ten (13%) came to visit friends and relatives. Very few Easterners visited Alaska for business only (4%) or business and pleasure (2%).

Entry Mode and Intended Exit Mode: Over half of Eastern visitors used Domestic Air as their primary transportation mode to and from the state. Cruise ship was the second most used entry and intended exit mode among Easterners, with 43% arriving by Cruise Ship, and 32% departing via Cruise Ship. Eastern visitors were more likely to arrive by Cruise Ship than visitors from all other regions. Very few Easterners traveled by each of the remaining entry modes (Ferry, Highway and International Air).

Intended Travel Type: Over half (59%) of Eastern visitors traveled on a Package trip, more than any other origin group. Four in ten (41%) visitors from the East were Independent travelers, with 12% planning to purchase sightseeing while in Alaska on their trip.

Intended Stay: The average length of stay for visitors from the East was 10 nights (10.4), slightly longer than the average Alaska visitor. Over one-third planned to stay between 3-6 nights and 7-13 nights each.

Party Size: Eastern visitors traveled in an average party size of 2.0. Nearly two-thirds (61%) traveled in pairs, while one-quarter (23%) traveled as individuals.

Repeat Visits: Fewer Easterners have been to Alaska in the past five years than visitors from all other regions (16%). Of those who have visited Alaska, the majority (12%) came for pleasure purposes, while only 4% traveled to Alaska for business.

Demographics: With an average age of 51, Easterners were among the oldest Alaska visitors, and slightly older than the average Alaska visitor. Gender was equally balanced among Eastern visitors with (52%) female and (49%) male, and in fact, the East produced the highest percentage of female visitors of any region. Over half (54%) were employed, while over one-third (37%) were retired.

Table V-F

East Region Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway
	1985	1986	1989	1993
Market Size				
West	50 %	48 %	43 %	37 %
California	19	21	17	14
Washington	13	14	12	10
Midwest	18	18	15	15
South	18	17	19	20
East	9	9	10	11
Canada	4	4	6	10
Overseas	n/a	3	6	6
Main Trip Purpose				
Vacation/Pleasure	73 %	80 %	76 %	79 %
VFR	13	6	16	13
Business & Pleasure	3	8	4	2
Business Only	8	5	2	4
Seasonal Worker	2	1	—	1
Entry Mode				
Domestic Air	45 %	40 %	49 %	50 %
Cruise Ship	45	45	42	43
Highway ²	7	10	5	5
Ferry	4	5	5	2
International Air	n/a	1	—	—
Intended Exit Mode				
Domestic Air	52 %	57 %	55 %	61 %
Cruise Ship	37	30	35	32
Highway	5	5	7	6
Ferry	4	4	3	1
International Air	n/a	—	—	<1
Intended Travel Type				
Package	54 %	50 %	59 %	59 %
Independent Total	46	50	42	41
Pure Independent	45	45	28	29
Inde-Package ³	1	5	14	12
Intended Stay - Average # Nights⁴	10	10	11	10
0 Nights	2 %	2 %	—	—
1-2	2	4	—	2
3-6	25	35	38	36
7-13	45	36	36	39
14-20	19	10	15	14
21+	7	13	11	9
Party Size⁵				
Average	2.3	2.1	2.4	2.0
Age - Average	51	49	51	51

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

Canadian Visitor Profile

Market Size: The Canadian market comprised 10% of all visitor entries into Alaska and 12% of the Vacation/Pleasure visitor market. Most Canadian visitors came from British Columbia, Yukon, Alberta and Ontario.

Main Trip Purpose: The majority of Canadian visitors came to Alaska for Vacation/Pleasure purposes (87%). Less than one-tenth of Canadians visited Alaska for each of the remaining trip purposes. Virtually no Canadians visited Alaska as Seasonal Workers.

Entry Mode and Intended Exit Mode: Nearly half (49%) of Canadians traveled to and from Alaska by Highway, while one-third used Cruise Ship. One-tenth used Domestic Air to enter or exit Alaska, while very few traveled by Ferry or International Air.

Intended Travel Type: Canadians primarily traveled as Independent visitors (60%), with 15% planning to purchase sightseeing while in Alaska. Four in ten (40%) Canadians were on a Packaged trip.

Intended Stay: Canadians spent an average of 6 nights (5.6) in the state, fewer nights than visitors from all other regions. Half (50%) of all visitors from Canada stayed between 3-6 nights in Alaska.

Party Size: The average party size for Canadians was 2.2. Nearly two-thirds (60%) traveled in pairs, while 17% traveled as individuals.

Repeat Visits: Over one-third (36%) of Canadians visited Alaska in the past five years, primarily for pleasure (34%). Only 9% of all visitors from Canada visited Alaska for business purposes.

Demographics: At 45, the average Canadian visitor was slightly younger than the average Alaska visitor. Gender was equally balanced among Canadians. Half (51%) of all visitors from Canada were employed and just over one-third (34%) were retired.

Table V-G

Canadian Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway 1993
	1985	1986	1989	
Market Size				
West	50 %	48 %	43 %	37 %
California	19	21	17	14
Washington	13	14	12	10
Midwest	18	18	15	15
South	18	17	19	20
East	9	9	10	11
Canada	4	4	6	10
Overseas	n/a	3	6	6
Main Trip Purpose				
Vacation/Pleasure	84 %	87 %	82 %	87 %
VFR	6	1	12	4
Business & Pleasure	6	7	—	6
Business Only	3	6	6	3
Seasonal Worker	2	—	—	—
Entry Mode				
Domestic Air	19 %	11 %	9 %	11 %
Cruise Ship	33	31	50	36
Highway ²	39	37	33	49
Ferry	9	14	8	4
International Air	n/a	—	—	—
Intended Exit Mode				
Domestic Air	17 %	5 %	10 %	9 %
Cruise Ship	31	29	47	35
Highway	37	44	37	48
Ferry	10	12	4	6
International Air	n/a	9	2	2
Intended Travel Type				
Package	36 %	40 %	54 %	40 %
Independent Total	64	60	46	60
Pure Independent	58	49	35	45
Inde-Package ³	6	11	11	15
Intended Stay - Average # Nights⁴	7	6	6	6
0 Nights	3 %	11 %	16 %	12 %
1-2	15	10	25	16
3-6	31	39	17	50
7-13	38	34	21	14
14-20	8	3	21	5
21+	5	4	2	4
Party Size⁵				
Average	2.4	1.9	2.4	2.2
Age - Average	48	51	51	45

¹ Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

² Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³ Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴ Computed excluding seasonal workers.

⁵ Computed excluding parties of 10 or more.

Overseas Visitor Profile

Note: This general overseas profile is followed by more detailed profile with information on the four largest overseas visitor groups: Japan, Australia/New Zealand, Germany/Switzerland/Austria, and Great Britain. The major differences between these groups affect the Overseas visitor averages, therefore this comparison is provided.

Market Size: Overseas visitors comprised just over 6% of the total visitor market and 7.5% of Vacation/Pleasure visitors during Summer 1993. Europe contributed nearly 4% of all visitors, while the Pacific Region accounted for 2%.

Main Trip Purpose: Overseas visitors primarily visited Alaska for Vacation/Pleasure (82%). Less than one-tenth of overseas visitors traveled to Alaska for each of the remaining trip purposes. Virtually no Overseas visitors were Seasonal Workers.

Entry Mode and Intended Exit Mode: The majority of Overseas visitors entered (36%) and intended to exit (32%) the state by Domestic carriers. International Air was the second most popular transportation mode for Overseas visitors, with 20% arriving by International Air and 27% intending to leave via the same mode. Cruise Ship and Highway were used by nearly one-fifth of Overseas visitors for entry and intended exit, while a few overseas visitors traveled by Ferry. The use of modes other than International Air indicated Overseas visitors were using gateways other than Anchorage to enter North America (i.e. Vancouver, Seattle, San Francisco, Portland) and may have included visits to other parts of Canada and the U.S. with their trip.

Intended Travel Type: Over half (59%) of Overseas visitors were Independent travelers, with 12% planning to purchase sightseeing while in Alaska. The remaining 41% were on a Package trip.

Intended Stay: Overseas visitors intended to stay longer than visitors from all other regions spending approximately 14 nights (13.5), considerably longer than the average visitor who stayed 10 nights (10.2). Visitors from Germany/Switzerland/Austria intended to stay the longest with an average of 16.0 nights.

Party Size: The average party size of Overseas visitors was 2.1 people, the same as the overall average.

Repeat Visits: One-fifth (21%) of Overseas visitors have been to Alaska in the past five years. Overseas visitors primarily came to Alaska for pleasure purposes (15%), only 4% visited Alaska for business.

Origin: Over half (57%) of all Overseas visitors were European. Over half (54%) of Europeans came from the countries of Germany/Switzerland/Austria, while Great Britain accounted for 28%. The Pacific Region (including Japan and Australia/New Zealand) brought one-third (32%) of overseas visitors, with Japan producing 36% and Australia/New Zealand representing 47% of Pacific Region visitors.

Demographics: At 42, Overseas visitors were younger than visitors from all regions except Washington. They were slightly more likely to be male (55%) and more likely to be employed (59%) than retired.

Table V-H

Overseas Visitor Profile

	← Without May Without Skagway ¹ →			With May With Skagway
	1985	1986	1989	1993
Market Size				
West	n/a	48 %	43 %	37 %
California	n/a	21	17	14
Washington	n/a	14	12	10
Midwest	n/a	18	15	15
South	n/a	17	19	20
East	n/a	9	10	11
Canada	n/a	4	6	10
Overseas	n/a	3	6	6
Main Trip Purpose				
Vacation/Pleasure	n/a	70 %	74 %	82 %
VFR	n/a	11	8	7
Business & Pleasure	n/a	7	7	5
Business Only	n/a	11	8	7
Seasonal Worker	n/a	2	3	-
Entry Mode				
Domestic Air	n/a	14 %	22 %	36 %
Cruise Ship	n/a	13	13	21
Highway ²	n/a	11	6	15
Ferry	n/a	5	6	8
International Air	n/a	55	54	20
Intended Exit Mode				
Domestic Air	n/a	25 %	32 %	32 %
Cruise Ship	n/a	10	11	19
Highway	n/a	11	10	18
Ferry	n/a	4	2	3
International Air	n/a	48	44	27
Intended Travel Type				
Package	n/a	27 %	54 %	41 %
Independent Total	n/a	73	46	59
Pure Independent	n/a	65	35	47
Inde-Package ³	n/a	8	11	12
Intended Stay - Average # Nights⁴	n/a	15	15	14
0 Nights	n/a	0 %	0 %	1 %
1-2	n/a	7	7	5
3-6	n/a	31	29	31
7-13	n/a	24	21	27
14-20	n/a	14	21	19
21+	n/a	25	21	17
Party Size⁵				
Average	n/a	1.9	2.2	2.1
Age - Average	n/a	37	45	42

¹Data is presented for all three summer sampling periods which do not include May and Skagway for comparative purposes.

²Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

⁴Computed excluding seasonal workers.

⁵Computed excluding parties of 10 or more.

Europe and Pacific Region Profiles

Market Size: The total Overseas market comprised 6.4% of all visitors and 7.5% of all Vacation/Pleasure visitors during Summer 1993.

- Over Half (57%) of all Overseas visitors originated from Europe, while two-thirds (64%) of Overseas Vacation/Pleasure visitors came from Europe.
- The Germany/Switzerland/Austria (G/S/A) market alone accounted for three in ten (31%) Overseas visitors and slightly more than one-third (37%) of all Overseas Vacation/Pleasure visitors.
- Great Britain represented 16% of the total Overseas market and 18% of Overseas Vacation/Pleasure visitors.
- The Pacific Region countries of Japan and Australia/New Zealand represented 26% of Overseas visitors and one-quarter of all Overseas Vacation/Pleasure visitors during Summer 1993.
- Japan represented 11% of all Overseas visitors and 11% of all Overseas VPs.
- Australia/New Zealand comprised 15% of the total Overseas market and 14% of Overseas Vacation/Pleasure visitors.

Main Trip Purpose: Most Overseas visitors came to Alaska for Vacation/Pleasure purposes (89%) during Summer 1993. Nine in ten (92%) European visitors and three-quarters of Pacific Region visitors traveled to Alaska for Vacation/Pleasure.

- Visitors from Germany/Switzerland/Austria (G/S/A) were more likely than all other Overseas visitors to travel to Alaska for Vacation/Pleasure purposes (98%). A few G/S/A visitors came to Alaska to visit friends and relatives.
- Nine in ten visitors from Great Britain primarily visited Alaska for Vacation/Pleasure purposes, while 5% came for business only. A few British visitors came to Alaska for business and pleasure.
- Japanese also primarily visited for Vacation/Pleasure, however, they represented the highest proportion of all Overseas visitors who came to Alaska for Business Only (17%), evidence of Alaska's business ties with Japan.

- Three-quarters of visitors from Australia/New Zealand came for Vacation/Pleasure purposes. Australia/New Zealand visitors represented the highest proportion (19%) of all Overseas visitors who traveled to Alaska to visit friends and relatives during Summer 1993. A small percentage (6%) of Australia/New Zealanders came to Alaska for Business and Pleasure.

Table V-I

**Overseas Visitors
Percent of Sampled Visitors
Summer 1993**

	Total Overseas	Germany/ Switzerland/ Austria	Great Britain	Japan	Australia New Zealand
Market Size					
All Overseas Visitors	53,500	16,400	8,500	6,000	8,100
Vacation/Pleasure	43,600	16,100	7,900	4,700	6,100
Main Trip Purpose					
Vacation/Pleasure	82 %	98 %	93 %	78 %	76 %
Visit Friends and Relatives	7	1	—	2	19
Business and Pleasure	5	1	1	3	6
Business Only	7	—	5	17	—
Seasonal Worker	—	—	—	—	—

Entry Mode and Intended Exit Mode: Major differences are noted in entry and intended exit mode among Overseas visitors. Europeans used a variety of transportation modes for travel to and from the state, while Pacific Region visitors primarily relied on International and Domestic Air to enter and exit Alaska.

- Germany/Switzerland/Austria visitors primarily used the Highway, followed by International Air and Domestic Air. G/S/A visitors used the Highway more than other Overseas visitors for several reasons. G/S/A visitors were more likely to be Independent travelers and stayed longer than other Overseas visitors which allowed time to drive the Highway. Also, many direct Overseas airline connections are routed through Calgary, Alberta and Vancouver, British Columbia, locations which are easily accessible to the Highway.
- Over half the visitors from Great Britain traveled by Cruise Ship, while about one-third used Domestic Air for travel to and from Alaska.

- Japanese visitors primarily traveled via International Air to and from Alaska, using Domestic Air secondarily. Very few Japanese traveled by each of the remaining transportation modes (Cruise Ship, Highway and Ferry). However, a small number of Japanese were observed on Cruise Ships, although none appeared in the random sample selection process.
- Australia/New Zealand visitors, overall, relied heavily on Domestic Air for travel to and from Alaska, although nearly one in ten traveled by Cruise Ship. Very few Australia/New Zealand visitors entered the state by International Air, although one in ten intended to exit by International Air.

Intended Travel Type: Over half (59%) of Overseas visitors were Independent travelers, with 12% planning to purchase sightseeing trips while in Alaska. Four in ten (41%) of Overseas visitors were on a Package trip.

- Visitors from Germany/Switzerland/Austria were more likely to be Independent travelers (71%) than all other Overseas visitors, and much less likely to travel on a Package trip (30%).
- Great Britain visitors were much more likely than all other Overseas visitors to travel on a Package trip (77%). One-quarter of British visitors were Independent travelers.
- Two-thirds of Japanese visitors traveled Independently, while four in ten traveled on a Package trip. One-tenth of Japanese visitors planned to purchase sightseeing trips while in Alaska.
- The Australia/New Zealand visitor travel type was the same as the Japanese visitor travel type. Two-thirds traveled independently, while 40% were on a Packaged trip. One-tenth of Australia/New Zealand visitors planned to purchase sightseeing trips while in Alaska.

Intended Stay: Overseas visitors spent an average of 13.5 nights, with visitors from G/S/A staying the longest at 16.0 nights. Visitors from Great Britain stayed longer than the average at 14.4 nights, while Australia/New Zealanders spent 12.8 nights. Japanese visitors stayed the shortest at 8.6 nights.

Party Size: Overseas visitors primarily traveled in pairs, with an average party size of 2.1. Visitors from Germany/Switzerland/Austria and Japan traveled in the largest parties, with 2.4 and 2.0 people respectively. Great Britain and Australian visitors traveled in smaller parties of slightly less than two (1.9 and 1.7 respectively).

Table V-J

**Overseas Visitors
Percent of Sampled Visitors
Summer 1993**

	Total Overseas	Germany/ Switzerland/ Austria	Great Britain	Japan	Australia New Zealand
Entry Mode					
International Air	20 %	20 %	—	62 %	—
Domestic Air	36	26	33	35	68
Cruise Ship	21	6	59	—	16
Highway ¹	15	35	2	3	6
Ferry	8	14	6	—	11
Intended Exit Mode					
International Air	27 %	26 %	5 %	58 %	13 %
Domestic Air	32	18	35	37	58
Cruise Ship	19	9	52	—	19
Highway	18	42	4	3	8
Ferry	3	6	2	—	3
Intended Travel Type					
Package	41 %	30 %	77 %	40 %	40 %
Independent Total	59	71	23	60	61
Pure Independent	47	53	17	47	50
Inde-Package ²	12	18	6	13	11
Intended Stay³					
Average # of Nights	13.5	16.0	14.4	8.6	12.8
Party Size⁴					
Average	2.1	2.4	1.9	2.0	1.7

¹Highway mode includes personal vehicles only. Motorcoaches and trucks are not included.
²Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.
³Computed excluding seasonal workers.
⁴Computed excluding parties of 10 or more.

Repeat Visits: Pacific Region visitors were more likely to have visited Alaska in the past five years for pleasure and/or business than other Overseas origin groups.

- Two in ten (20%) of visitors from Germany/Switzerland/Austria visited Alaska in the past five years, primarily for pleasure (16%).
- Visitors from Great Britain were the least likely to have been to Alaska in the past five years, with less than one in ten (5%) visiting for business and/or pleasure.
- Japanese visitors were the most likely to have visited Alaska in the past five years (43%), with one-third (33%) visiting for pleasure and 20% coming for business.
- Two in ten (20%) of visitors from Australia/New Zealand have been to Alaska in the past five years, primarily for pleasure (14%).

Demographics:

- The average visitor from Germany/Switzerland/Austria was 41 years old, slightly younger than the average Overseas visitor, and more likely to be male. Two-thirds of G/S/A visitors were employed, more than any other Overseas origin group, and nearly two in ten were retired.
- Visitors from Great Britain were older than the average visitor at 50 years old and just as likely to be male as female. British visitors were less likely than other Overseas visitors to be employed (48%) and next to Australia/New Zealanders, were more likely to be retired (42%) than other Overseas origin groups.
- Japanese visitors were the youngest of all Overseas visitors, and at 34, eight years younger than the average Overseas visitor. Gender was equally balanced among Japanese visitors with 52% male and 48% female. Japanese visitors had a lower proportion of retired visitors (6%) than any other Overseas origin group, and a higher proportion of visitors in the Other category. Over one-third of Japanese visitors were in the Other category which includes individuals not in the labor force such as students, children and family members staying home.
- At 54, Australia/New Zealanders were the oldest Overseas visitors and more likely to be female (53%), than all other Overseas visitors. Visitors from Australia/New Zealand also have a higher percentage of retired visitors (46%) than any other Overseas origin group.

Table V-K

**Overseas Visitors
Percent of Sampled Visitors
Summer 1993**

	Total Overseas	Germany/ Switzerland/ Austria	Great Britain	Japan	Australia New Zealand
Repeat Visits					
For Pleasure	15 %	16 %	5 %	33 %	14 %
For Business	8	5	—	20	6
Total Repeating	21	20	5	43	20
Age					
Average	42.3	41.3	49.8	34.4	54.2
Gender					
Male	55 %	59 %	50 %	52 %	47 %
Female	45	41	50	48	53
Employment Status					
Employed	59 %	66 %	48 %	60 %	51 %
Retired	21	15	42	6	46
Other	20	19	10	35	3

Table V-L

Summary Profile

Visitors By Place of Origin

	Total	West	Calif	Wash	Mid-west	South	East	Canada	Over Seas
Market Significance									
% of Total Visitors	100 %	37 %	14 %	10 %	15 %	20 %	11 %	10 %	6 %
Main Trip Purpose	%	%	%	%	%	%	%	%	%
% Business Only	11	17	11	32	6	9	4	3	7
% Business & Pleasure	7	10	10	12	5	5	2	6	5
% Vacation/Pleasure	69	58	70	38	78	75	79	87	82
% VFR	12	13	9	15	11	10	13	4	7
Entry Mode									
% Domestic Air	59	67	60	82	54	54	50	11	36
% International Air	-	-	-	-	-	-	-	-	20
% Cruise Ship	30	21	32	8	30	38	43	36	21
% Ferry	3	4	3	4	3	2	2	4	8
% Highway ¹	8	8	5	6	13	6	5	49	15
Intended Exit Mode									
% Domestic Air	62	67	61	79	55	58	61	9	32
% International Air	<1	<1	<1	<1	-	-	<1	2	27
% Cruise Ship	27	20	30	9	28	34	32	35	19
% Ferry	2	3	2	3	3	1	1	6	3
% Highway	9	9	6	7	14	6	6	48	18
Intended Travel Type									
% Package Tour	44	33	44	20	50	50	59	40	41
% Independent Total	57	67	56	80	50	50	41	60	59
% Pure Independent	44	54	43	70	36	39	29	45	47
% Inde-Package ²	13	13	13	10	14	11	12	15	12
Intended Stay³									
Average # of Nights	10	11	9	10	12	9	10	6	14
Party Size⁴									
Average # of Persons	2	2	2	2	2	2	2	2	2
Repeat Visits (Last 5 Yrs.)									
% Repeating for Pleasure	23	30	25	35	15	19	12	34	15
% Repeating for Business	14	25	14	45	7	9	4	9	4
% Repeating, Total	33	48	34	67	21	26	16	24	21
Average Age	49	46	48	42	51	50	51	45	42
Gender									
Male	53	57	55	63	50	53	49	50	55
Female	47	43	46	37	50	47	52	50	45
Employment Status									
% Employed	56	63	61	71	50	50	54	51	59
% Retired	33	27	28	20	41	37	37	34	21
% Other	11	11	11	10	9	13	9	15	20

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

² Inde-Package visitors are Independents who plan to purchase sightseeing tours during their trip.

³ Computed excluding seasonal workers.

⁴ Computed excluding parties of 10 or more.



Appendix

Methodology Summary

Acknowledgments

Survey Instruments

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Methodology Summary

The Arrival Count (AC) is the method of counting all passengers (visitors and residents) who entered the state. The count is conducted by obtaining passenger counts from airlines and ferry carriers, Highway arrivals through U.S. Customs records and Cruise Ship arrivals from Cruise Line Agencies of Alaska.

The *Random Arrival Survey* (RAS) then determines whether passengers are residents or visitors. Ratios of visitors to residents are calculated from this survey for each entry mode and location. These ratios are applied to the Arrival Count figures to develop the actual visitor figures. Since scientific sampling reflects the total population characteristics accurately, a high level of confidence exists in the true composition of all arrival figures. The resulting data in this report can be considered accurate within $\pm 0.3\%$ to $\pm 1.6\%$ at the 95% confidence level.

The *Random Arrival Survey* methodology is based on personally interviewing statistically selected passengers arriving by major modes as they arrive at their first point of entry by Domestic Air, Highway, Cruise Ship, Ferry (Alaska Marine Highway System) and International Air. Sampling is done at Anchorage, Fairbanks, Juneau, Ketchikan, Klondike Highway, Alaska Highway and Taylor Highway, as well as on the Ferry from Bellingham and Prince Rupert to Ketchikan. Sampling began in May 1993 and will continue through April 1994. Traffic sampled at these locations is estimated to account for 97% of all traffic entering Alaska by these modes.

The personal interview technique was selected as the methodology which would best minimize non-response and omit self selection bias, two problems common to travel research projects. Personal interviewing allows for control of the interviewing environment and scientifically accurate selection of respondents. Equally important, personal RAS interviewing has a positive effect on response to the *Visitor Opinion Survey* and *Visitor Expenditure Survey* phases of the program.

Methodologies by Mode

RAS interviewing methodology is the same for each of the five modes surveyed. However, scientific sampling design and interview interception point vary by mode. The following provides an overview of the arrival count, sample design, and fielding methodologies by modes.

Domestic Air

Domestic Air arrival counts were obtained through a voluntary confidential reporting system. All Domestic Air carriers participated, making possible an analysis of the complete Domestic Air Alaska visitor market.

During the summer months of May through September, the *Random Arrival Survey* was administered by uniformed, professionally trained interviewers who met scientifically selected flights on 37 randomly selected sample days at four points in Alaska: Anchorage, Fairbanks, Juneau and Ketchikan. Passengers were identified as residents or visitors. As part of the sampling process the interviewer team presented the interviewer with a small Alaska lapel pin. The number of visitors interviewed from each flight was four. Through the sampling process, each visitor disembarking the airplane had an equal chance of being interviewed. Approximately 97% of the visitors selected through this procedure completed the RAS interview.

Cruise Ship

Cruise Ship arrival count data was obtained through Cruise Line Agencies of Alaska in Ketchikan.

For the Cruise Ship sample contained a random selection of 37 Cruise Ship voyages from May through September. The selection was based upon passenger loads. Four uniformed interviewers met each selected ship and interviewed every "nth" passenger as they came ashore. Interviewing procedure was the same as Domestic Air; the passenger was presented with the lapel pin and then interviewed. Twenty interviews were conducted from each vessel, with the sample distributed among passengers taking tours and not taking tours. Nearly all passengers approached agreed to be interviewed, with less than 2% refusing.

Alaska Marine Highway System

Arrival count data for the Marine Highway was obtained from computer scanned passenger tickets generated by the Marine Highway Manager's office in Juneau.

From May through September, uniformed interviewers rode the ferry between Bellingham and Ketchikan, and Prince Rupert and Ketchikan on 30 randomly selected voyages. Voyages were selected in proportion to passenger load. During the sailing, interviewers followed a predetermined skip pattern in each section of the vessel to determine resident/visitor composition and ensure random selection of respondents. Passengers were approached according to the skip pattern and the RAS was administered using the same procedure as other modes. Summer season target samples per voyage were 30 on the Bellingham-Ketchikan run and 20 on the Prince Rupert-Ketchikan run. All passengers approached agreed to complete the interview, with none refusing.

Highway

Arrival count data was obtained from the U.S. Customs Port Director's offices in Alcan and Skagway.

Three highway locations were sampled from May through September: The border stations on the Alaska Highway at Alcan, the Taylor Highway at Poker Creek, and the Klondike Highway at Skagway. Forty sample periods were selected based upon traffic patterns and weighted in proportion to traffic volume. A tally of highway traffic was kept to determine resident/visitor composition. Every "nth" vehicle was administered the RAS by a uniformed interviewer immediately after clearing customs at Alcan, Poker Creek and Skagway. Only those highway travelers who were entering Alaska for the first time (rather than having arrived via Ferry or visited somewhere in Alaska previously on this trip) were interviewed. The procedure for administering the RAS was the same as previous modes. Most visitors approached agreed to be interviewed with a refusal rate of less than 5%.

Motorcoach passengers were not interviewed for the Summer 1993 RAS. However, during each sampled period, all motorcoaches were stopped and drivers were asked the origin of the motorcoach, the number of passengers and whether the motorcoach was entering Alaska for the first time on this trip. This information was used to determine the size of the first arrival motorcoach market.

International Air

International Air arrival count data was obtained through the office of the Development Specialist at the Anchorage International Airport.

From May through September, International Air passengers were administered the RAS on 25 statistically selected sample days by uniformed interviewers. All passengers deplaning on sample days were asked resident/visitor status as they left U.S. Customs and every "nth" visitor was interviewed. Five to twenty interviews were conducted each sample day, depending on flight schedules. To minimize non-response and ensure a representative sample of all visitors, interviewers were assisted by foreign language questionnaires (in Japanese, German and Russian), signs in the terminal area, and Japanese, German, Russian and French-speaking interviewers. Refusal rate on International Air was slightly higher than other modes, approximately 8%, primarily due to cultural considerations.

Data Weighting Procedure

Following sample design and actual fielding, raw RAS results were then submitted to a statistical weighting procedure in the data processing phase. This sample weighting ensured accurate expansion of sample results to the arriving passenger population.

The weighting is a multistage procedure and includes voyage and flight passenger loads, detailed arrival count by mode, and resident/visitor sample proportions at all sample points by mode, location and time period.

Sample Size and Reliability

The final result of the May-September 1993 season RAS program was a statistically reliable random sample of 3,872 arriving visitors with a maximum margin of error of $\pm 1.6\%$ and a probable margin of error for most results of $\pm 0.3\%$ to $\pm 1.6\%$. The standard margin of error accepted for most scientifically controlled market studies is usually much greater $\pm 5.0\%$. The *Alaska Visitor Statistics Program* ensures that even sub-analysis by each individual entry mode is subject to this standard margin of error or less, with one exception: International Air maximum margin of error is closer to 6%.

Table A-I

Random Arrival Survey Sample Distribution Summer 1993

Mode	Number of Interviews
Domestic Air	1,223
Cruise Ship	739
Highway	896
Ferry	679
International Air	335
Total	3,872

Table A-II

**RAS Subsample Minimum & Maximum Error Levels
At 95% Confidence Level**

When Survey Result is:	The Maximum Margin of Error is:
1% or 99%	±0.3%
10% or 90%	±1.0%
20% or 80%	±1.3%
30% or 70%	±1.4%
40% or 60%	±1.5%
50% or 50%	±1.6%

This table reads: Given the subsample size of 3,872, readers may be 95% certain that any statewide survey result is within a maximum of $\pm 1.6\%$ of the true mean of the survey population. For example, the survey results show that 36.8% of the visitors originated in the Western U.S. Readers can be 95% certain that the true proportion of Westerners is between 35.2% and 38.4%.

The RAS was designed to yield reliable subsamples of each entry mode's visitors. The margin of error rated for entry and trip purpose categories are as follows. These should be considered when examining results in these subcategories.

Table A-III

**RAS Subsample Minimum & Maximum Error Level
At 95% Confidence Level**

Mode	Sample Size	Margin of Error When Survey Result is:	
		1% of 99%	50%
Domestic Air	1,223	±0.6%	±2.9%
Cruise Ship	739	±0.7%	±3.5%
Highway	896	±0.7%	±3.5%
Ferry	679	±0.8%	±4.1%
International Air	335	±1.1%	±5.8%
Main Trip Purpose			
Vacation/Pleasure	2,895	±0.4%	±1.6%
Visiting Friends and Relatives	366	±1.0%	±5.0%
Business and Pleasure	232	±1.2%	±6.3%
Business Only	293	±1.1%	±5.8%
Seasonal Workers	86	±2.3%	±11.5%

Most RAS questions are "multiple choice" questions, allowing the respondent to choose one of many alternatives. Therefore, more survey results are likely to be smaller percents than 50% where the maximum margin of error occurs. In other words, RAS results will more likely be subject to the Minimum Margins of Error in the table above than to the Maximum.

Acknowledgments

The *Random Arrival Survey* and the Arrival Count phases of the *Alaska Visitors Statistics Program* rely a great deal on the cooperation and good will of many people and organizations involved in the Alaska visitors industry. We would like to thank the following for their assistance:

- The management, air and ground crews of the Domestic Air carriers serving Alaska: Alaska Airlines, Delta Airlines, United Airlines, Northwest Airlines, Hawaiian Airlines, Morris Air, Sun Country, Continental and MarkAir;
- The management and ground crews serving the International Air carriers, and the Development Specialist office at the Anchorage International Airport;
- The Alaska Marine Highway System management and on-board personnel;
- The management, cruise directors and motorcoach coordinators for the cruise lines, as well as Cruise Line Agencies of Alaska;
- The U.S. Customs Service personnel at Alcan, Poker Creek and Skagway.

Survey Instruments

Following this section is a compilation of the RAS used during the face to face interviews.

STATE OF ALASKA 1993-94 RANDOM ARRIVAL SURVEY

1. ARE YOU A VISITOR TO ALASKA? (PLEASE CIRCLE NUMBER)
 1. NO THE SURVEY IS FOR VISITORS ONLY. PLEASE CIRCLE "1" AND RETURN THIS QUESTIONNAIRE TO THE PERSON WHO GAVE IT TO YOU. THANK YOU.
 2. YES (CONTINUE)
2. IS THIS THE FIRST STOP IN ALASKA FOR YOU? (CIRCLE NUMBER)
 1. NO THE SURVEY IS FOR VISITORS AT THEIR FIRST POINT OF ENTRY ONLY. PLEASE CIRCLE "1" AND RETURN THIS QUESTIONNAIRE TO THE PERSON WHO GAVE IT TO YOU. THANK YOU.
 2. YES (CONTINUE)
3. WHICH OF THESE CATEGORIES BEST DESCRIBES THE MAIN PURPOSE OF THIS ALASKA TRIP?
(CIRCLE ONE NUMBER ONLY IN FIRST COLUMN)
 1. BUSINESS ONLY
 2. BUSINESS AND PLEASURE.....WILL YOU ADD DAYS BEYOND THE BUSINESS PORTION OF YOUR TRIP TO ACCOMMODATE PLEASURE ACTIVITIES?
 1. YES
 2. NO
 3. DON'T KNOW/NOT SURE

.....WILL YOU ALSO BE VISITING FRIENDS/RELATIVES?

 1. YES
 2. NO
 3. DON'T KNOW/NOT SURE
 3. VACATION/PLEASURE.....WILL YOU ALSO BE VISITING FRIENDS/RELATIVES?
 1. YES
 2. NO
 3. DON'T KNOW/NOT SURE
 4. VISITING FRIENDS OR RELATIVES.....WILL YOU:
 1. SIGHTSEE ONLY IN THE LOCAL AREA IN WHICH YOUR FRIENDS OR RELATIVES LIVE, OR
 2. ALSO SIGHTSEE IN OTHER AREAS OF ALASKA?
 5. SEASONAL/PIPELINE WORKER
4. HOW MANY NIGHTS DO YOU PLAN TO SPEND IN ALASKA ON THIS TRIP?
(RECORD NUMBER BELOW. IF NONE, RECORD "0")

_____ # OF NIGHTS (ESTIMATE: ____YES ____NO)
5. WHAT MODE OF TRANSPORTATION WILL YOU USE WHEN YOU CROSS THE ALASKA STATE LINE LEAVING ALASKA ON THIS TRIP? (CIRCLE NUMBER)
 1. AIR TO USA
 2. AIR TO FOREIGN DESTINATION
 3. COMMERCIAL CRUISE SHIP
 4. ALASKA STATE FERRY
 5. HIGHWAY.....WILL YOU BE TAKING YOUR VEHICLE ONTO A FERRY WHEN YOU LEAVE ALASKA?
 1. NO
 2. YES

.....WHICH TYPE OF VEHICLE WILL YOU BE USING?

 1. AUTO
 2. CAMPER/RV
 3. MOTORCOACH
 4. OTHER _____
 6. COMMERCIAL BOAT/FREIGHTER
 7. PRIVATE BOAT
 8. MILITARY BOAT
 9. DON'T KNOW/NOT SURE
6. WHICH TYPE OF TRAVEL BEST DESCRIBES THIS TRIP? (CIRCLE NUMBER)
 1. ON A PACKAGED TRIP
 2. COMPLETELY ON OWN
 3. COMPLETELY ON OWN BUT WILL PURCHASE SIGHTSEEING TRIPS WHILE HERE

"PACKAGED TRIP" - WHEN YOU HAVE LODGING AND TRANSPORTATION AND/OR SIGHTSEEING PREARRANGED AND YOU PAY A SINGLE PRICE IN ADVANCE
7. INCLUDING YOURSELF, HOW MANY ARE TRAVELING IN YOUR IMMEDIATE PARTY SHARING EXPENSES SUCH AS FOOD, LODGING OR LOCAL TRANSPORTATION?

_____ NO. IN PARTY

8. WHAT ARE THE AGES AND SEX OF THESE (NUMBER ANSWER TO Q. 7) PEOPLE? (RECORD NUMBERS IN SPACES)

	MALE	FEMALE
UNDER 18	_____	_____
18 - 24	_____	_____
25 - 34	_____	_____
35 - 44	_____	_____
45 - 54	_____	_____
55 - 64	_____	_____
65 - 74	_____	_____
75 AND OLDER	_____	_____

9. WHAT IS THEIR EMPLOYMENT STATUS? (RECORD NUMBERS IN SPACES BELOW)

	MALE	FEMALE
EMPLOYED	_____	_____
RETIRED	_____	_____
OTHER	_____	_____

10. IN THE LAST FIVE YEARS, HOW MANY OTHER TRIPS HAVE YOU MADE TO ALASKA FOR PLEASURE?
FOR BUSINESS?

FOR PLEASURE _____ # OF TRIPS FOR BUSINESS _____ # OF TRIPS

THESE ARE ALL THE QUESTIONS WE HAVE FOR YOU TODAY. FOR THIS SURVEY RESEARCH PROJECT TO BE COMPLETE, WE WOULD LIKE TO BE ABLE TO ASK YOU ABOUT YOUR TRIP AFTER YOU RETURN HOME. YOUR NAME AND ADDRESS WILL BE KEPT CONFIDENTIAL AND UTILIZED SOLELY FOR THE PURPOSE OF THIS SURVEY. THE STATE OF ALASKA THANKS YOU.

NAME: _____

FULL STREET ADDRESS: _____

CITY /STATE/PROVINCE: _____

COUNTRY: _____

ZIP CODE: _____

AGAIN, THANK YOU VERY MUCH FOR YOUR HELP. WE HOPE YOUR STAY IN ALASKA IS PLEASANT AND REWARDING!

COMMENTS: _____

FOR INTERVIEWER/OFFICE USE ONLY

DATE: ____/____/____ INTERVIEWER #: _____

LOCATION: 1 KTN 2 JNU 3 ANC 4 FAI 5 SGY 6 POKER 7 ALCAN

MODE: 1 Domestic Air 2 International Air 3 Cruise-Walk 4 Cruise-Tour
5 Ferry-PR 6 Ferry-Bel 7 Hwy-FV

SAMPLES: Flight No. _____

Domestic Air: 1 AS 2 BF 3 CO 4 DL 5 HA 6 NW 7 UA 8 Other _____

Int'l Air: 1 AS 2 BALAIR 3 CI 4 DL 5 JAZ 6 KE 7 SU 8 Other _____

Cruise: 01 Nieuw Amster 02 Noordam 03 Rotterdam 04 Westerdam
05 Crown Princ 06 Dawn Princ 07 Gold Princ 08 Fair Princ
09 Regal Princ 10 Sky Princ 11 Star Princ 12 Regent Sea
13 Regent Star 14 Costa Rive 15 Nord Princ 16 Gold Odyssey
17 Sagafford 18 Universe

Ferry: 1 Taku 2 Aurora 3 Malaspina 4 Matanuska 5 Columbia

Hwy: 1 Auto 2 Camper/RV 3 Other

STATE OF ALASKA 1993-94 RANDOM ARRIVAL SURVEY

1. **ARE YOU A VISITOR TO ALASKA? (PLEASE CIRCLE NUMBER)**
 1. **NO** THE SURVEY IS FOR VISITORS ONLY. PLEASE CIRCLE "1" AND RETURN THIS QUESTIONNAIRE TO THE PERSON WHO GAVE IT TO YOU. THANK YOU.
 2. **YES** (CONTINUE)
- 2A. **DID YOU ENTER ALASKA WITH YOUR VEHICLE ON A FERRY? (CIRCLE NUMBER)**
 1. **YES** THE SURVEY IS FOR VISITORS AT THEIR FIRST POINT OF ENTRY ONLY. PLEASE CIRCLE "1" AND RETURN THIS QUESTIONNAIRE TO THE PERSON WHO GAVE IT TO YOU. THANK YOU.
 2. **NO** (CONTINUE)
- 2B. **DID YOU ENTER ALASKA BY ROAD AT HAINES, SKAGWAY OR HYDER? (CIRCLE NUMBER)**
 1. **YES** THE SURVEY IS FOR VISITORS AT THEIR FIRST POINT OF ENTRY ONLY. PLEASE CIRCLE "1" AND RETURN THIS QUESTIONNAIRE TO THE PERSON WHO GAVE IT TO YOU. THANK YOU.
 2. **NO** (CONTINUE)
3. **WHICH OF THESE CATEGORIES BEST DESCRIBES THE MAIN PURPOSE OF THIS ALASKA TRIP?**
(CIRCLE ONE NUMBER ONLY IN FIRST COLUMN)
 1. **BUSINESS ONLY**
 2. **BUSINESS AND PLEASURE**.....WILL YOU ADD DAYS BEYOND THE BUSINESS PORTION OF YOUR TRIP TO ACCOMMODATE PLEASURE ACTIVITIES?
 1. **YES**
 2. **NO**
 3. **DON'T KNOW/NOT SURE**
 -WILL YOU ALSO BE VISITING FRIENDS/RELATIVES?
 1. **YES**
 2. **NO**
 3. **DON'T KNOW/NOT SURE**
 3. **VACATION/PLEASURE**.....WILL YOU ALSO BE VISITING FRIENDS/RELATIVES?
 1. **YES**
 2. **NO**
 3. **DON'T KNOW/NOT SURE**
 4. **VISITING FRIENDS OR RELATIVES**.....WILL YOU:
 1. **SIGHTSEE ONLY IN THE LOCAL AREA IN WHICH YOUR FRIENDS OR RELATIVES LIVE, OR**
 2. **ALSO SIGHTSEE IN OTHER AREAS OF ALASKA?**
 5. **SEASONAL/PIPELINE WORKER**
4. **HOW MANY NIGHTS DO YOU PLAN TO SPEND IN ALASKA ON THIS TRIP?**
(RECORD NUMBER BELOW. IF NONE, RECORD "0")
_____ # OF NIGHTS (ESTIMATE: ____ YES ____ NO)
5. **WHAT MODE OF TRANSPORTATION WILL YOU USE WHEN YOU CROSS THE ALASKA STATE LINE LEAVING ALASKA ON THIS TRIP? (CIRCLE NUMBER)**
 1. **AIR TO USA**
 2. **AIR TO FOREIGN DESTINATION**
 3. **COMMERCIAL CRUISE SHIP**
 4. **ALASKA STATE FERRY**
 5. **HIGHWAY**.....WILL YOU BE TAKING YOUR VEHICLE ONTO A FERRY WHEN YOU LEAVE ALASKA?
 1. **NO**
 2. **YES**
 -WHICH TYPE OF VEHICLE WILL YOU BE USING?

1. AUTO	3. MOTORCOACH
2. CAMPER/RV	4. OTHER _____
 6. **COMMERCIAL BOAT/FREIGHTER**
 7. **PRIVATE BOAT**
 8. **MILITARY BOAT**
 9. **DON'T KNOW/NOT SURE**
6. **WHICH TYPE OF TRAVEL BEST DESCRIBES THIS TRIP? (CIRCLE NUMBER)**
 1. **ON A PACKAGED TRIP**
 2. **COMPLETELY ON OWN**
 3. **COMPLETELY ON OWN BUT WILL PURCHASE SIGHTSEEING TRIPS WHILE HERE**

"PACKAGED TRIP" - WHEN YOU HAVE LODGING AND TRANSPORTATION AND/OR SIGHTSEEING PREARRANGED AND YOU PAY A SINGLE PRICE IN ADVANCE.

7. INCLUDING YOURSELF, HOW MANY ARE TRAVELING IN YOUR IMMEDIATE PARTY SHARING EXPENSES SUCH AS FOOD, LODGING OR LOCAL TRANSPORTATION?
_____ NO. IN PARTY

8. WHAT ARE THE AGES AND SEX OF THESE (NUMBER ANSWER TO Q. 7) PEOPLE? (RECORD NUMBERS IN SPACES)

	MALE	FEMALE
UNDER 18	_____	_____
18 - 24	_____	_____
25 - 34	_____	_____
35 - 44	_____	_____
45 - 54	_____	_____
55 - 64	_____	_____
65 - 74	_____	_____
75 AND OLDER	_____	_____

9. WHAT IS THEIR EMPLOYMENT STATUS? (RECORD NUMBERS IN SPACES BELOW)

	MALE	FEMALE
EMPLOYED	_____	_____
RETIRED	_____	_____
OTHER	_____	_____

10. IN THE LAST FIVE YEARS, HOW MANY OTHER TRIPS HAVE YOU MADE TO ALASKA FOR PLEASURE?
FOR BUSINESS?

FOR PLEASURE _____ # OF TRIPS FOR BUSINESS _____ # OF TRIPS

THESE ARE ALL THE QUESTIONS WE HAVE FOR YOU TODAY. FOR THIS SURVEY RESEARCH PROJECT TO BE COMPLETE, WE WOULD LIKE TO BE ABLE TO ASK YOU ABOUT YOUR TRIP AFTER YOU RETURN HOME. YOUR NAME AND ADDRESS WILL BE KEPT CONFIDENTIAL AND UTILIZED SOLELY FOR THE PURPOSE OF THIS SURVEY. THE STATE OF ALASKA THANKS YOU.

NAME: _____

FULL STREET ADDRESS: _____

CITY/STATE/PROVINCE: _____

COUNTRY: _____

ZIP CODE: _____

AGAIN, THANK YOU VERY MUCH FOR YOUR HELP. WE HOPE YOUR STAY IN ALASKA IS PLEASANT AND REWARDING!

COMMENTS: _____

FOR INTERVIEWER/OFFICE USE ONLY

DATE: ____/____/____ INTERVIEWER #: _____

LOCATION: 1 KTN 2 JNU 3 ANC 4 FAI 5 SGY 6 POKER 7 ALCAN

MODE: 1 Domestic Air 2 International Air 3 Cruise-Walk 4 Cruise-Tour
5 Ferry-PR 6 Ferry-Bel 7 Hwy-PV

SAMPLES: Flight No. _____

Domestic Air: 1 AS 2 BP 3 CO 4 DL 5 HA 6 NW 7 UA 8 Other _____

Int'l Air: 1 AS 2 BALAIR 3 CI 4 DL 5 JAZ 6 KE 7 SU 8 Other _____

Cruise: 01 Nieuw Amster 02 Noordam 03 Rotterdam 04 Westerdam
05 Crown Princ 06 Dawn Princ 07 Gold Princ 08 Fair Princ
09 Regal Princ 10 Sky Princ 11 Star Princ 12 Regent Sea
13 Regent Star 14 Costa Rive 15 Nord Princ 16 Gold Odyssey
17 Sagafjord 18 Universe

Ferry: 1 Taku 2 Aurora 3 Malaspina 4 Matanuska 5 Columbia

Hwy: 1 Auto 2 Camper/RV 3 Other

